8. System Outputs

8.1 Reports Selection

This is the dialog for choosing reports to print. This dialog can be accessed from the System Outputs toolbar button. Please note that not all outputs can be accessed from this location. In those instances the access location will be described along with the dialog description.
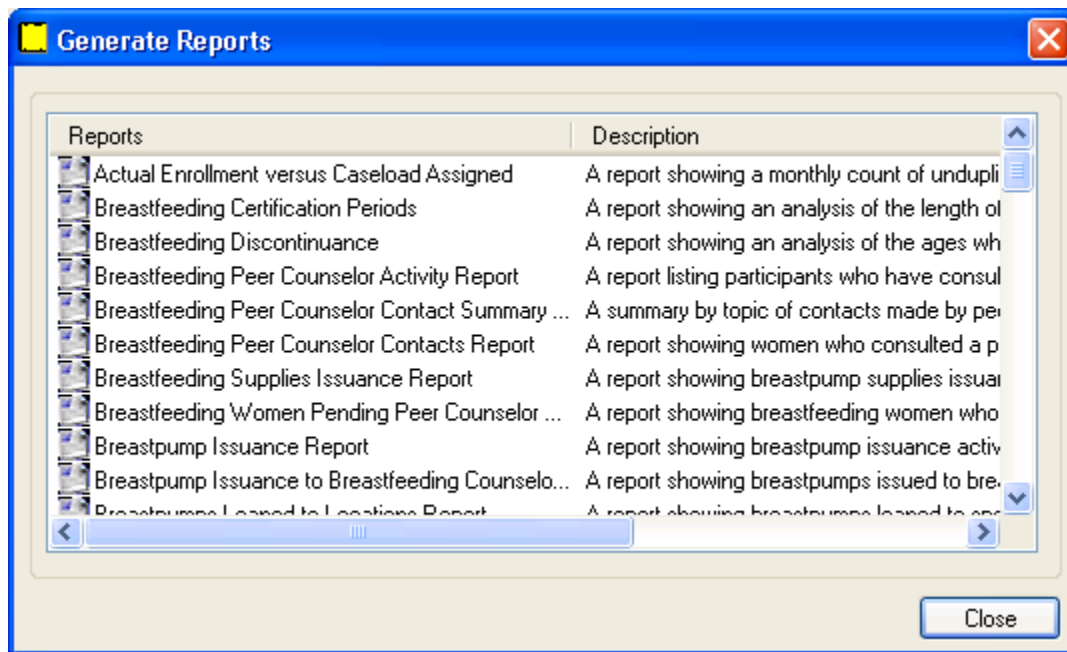
Figure 1 – Generate Reports Dialog

8.1.1 Controls

This section describes the behavior of the controls on the Generate Report dialog.

8.1.1.1 Reports Display List

This control allows the user to view the list of available reports. The display list will be enabled when the Generate Reports dialog is active. It will display entries for all available reports. Each entry displays as a small icon and a text label that displays to the right of the icon in the Report attribute. Additional information is provided for each entry in the Description attribute. The entries are arranged vertically, each on its own line with information arranged in attributes.

8.1.1.1.1 Actual Enrollment Versus Caseload Assigned List Item

Upon selection of the Actual Enrollment Versus Caseload Assigned list item, the system will invoke the Generate Actual Enrollment Versus Caseload Assigned dialog described in this document. The list item will be enabled when the Generate Reports dialog is active.

8.1.1.1.2 Breastfeeding Certification Periods List Item

Upon selection of the Breastfeeding Certification Periods list item, the system will invoke the Generate Breastfeeding Certification Periods dialog described in *Chapter 15 – Operations Reports*. The list item will be enabled when the Generate Reports dialog is active.

8.1.1.1.3 Breastfeeding Discontinuance List Item

Upon selection of the Breastfeeding Discontinuance list item, the system will invoke the Generate Breastfeeding Discontinuance dialog described in *Chapter 15 – Operations Reports*. The list item will be enabled when the Generate Reports dialog is active.

8.1.1.1.4 Breastfeeding Peer Counselor Activity List Item

Upon selection of the Breastfeeding Peer Counselor Activity list item, the system will invoke the Generate Breastfeeding Peer Counselor Activity dialog described in *Chapter 05 – Breastfeeding Peer Counselor Reports*. The list item will be enabled when the Generate Reports dialog is active.

8.1.1.1.5 Breastfeeding Peer Counselor Contact Summary List Item

Upon selection of the Breastfeeding Peer Counselor Contact Summary list item, the system will invoke the Generate Breastfeeding Peer Counselor Contact Summary dialog described in *Chapter 05 – Breastfeeding Peer Counselor Reports*. The list item will be enabled when the Generate Reports dialog is active.

8.1.1.1.6 Breastfeeding Peer Counselor Contacts List Item

Upon selection of the Breastfeeding Peer Counselor Contacts list item, the system will invoke the Generate Breastfeeding Peer Counselor Contacts dialog described in *Chapter 05 – Breastfeeding Peer Counselor Reports*. The list item will be enabled when the Generate Reports dialog is active.

8.1.1.1.7 Breastfeeding Supplies Issuance List Item

Upon selection of the Breastfeeding Supplies Issuance list item, the system will invoke the Generate Breastfeeding Supplies Issuance Report dialog described in *Chapter 04 – Breastpump Reports*. The list item will be enabled when the Generate Reports dialog is active.

8.1.1.1.8 Breastfeeding Women Pending Peer Counselor Contact List Item

Upon selection of the Breastfeeding Women Pending Peer Counselor Contact list item, the system will invoke the Generate Breastfeeding Women Pending Peer Counselor Contact Report dialog described in *Chapter 05 – Breastfeeding Peer Counselor Reports*. The list item will be enabled when the Generate Reports dialog is active.

8.1.1.1.9 Breastpump Issuance List Item

Upon selection of the Breastpump Issuance list item, the system will invoke the Generate Breastpump Issuance Report dialog described in *Chapter 04 – Breastpump Reports*. The list item will be enabled when the Generate Reports dialog is active.

8.1.1.1.10 Breastpump Issuance to Breastfeeding Counselors List Item

Upon selection of the Breastpump Issuance to Breastfeeding Counselor list item, the system will invoke the Generate Breastpump Issuance to Breastfeeding Counselors Report window described in *Chapter 04 - Breastpump Reports*.

8.1.1.1.11 Breastpumps Loaned to Locations List Item

Upon selection of the Breastpumps Loaned to Locations list item, the system will invoke the Generate Loaned to Locations Report window described in *Chapter 04 - Breastpump Reports*.

8.1.1.1.12 Breastpumps Returned to Manufacturer List Item

Upon selection of the Breastpumps Returned to Manufacturer list item, the system will invoke the Generate Breastpumps Returned to Manufacturer Report dialog described in *Chapter 04 – Breastpump Reports*. The list item will be enabled when the Generate Reports dialog is active.

8.1.1.1.13 Caseload Assigned Comparison - Enrollment List Item

Upon selection of the Caseload Assigned Comparison - Enrollment list item, the system will invoke the Generate Caseload Assigned Comparison - Enrollment dialog described in this document. The list item will be enabled when the Generate Reports dialog is active.

8.1.1.1.14 Caseload Management Projection System List Item

Upon selection of the Caseload Management Projection System list item, the system will invoke the Generate Caseload Management Projection System dialog described in *Chapter 11 – Caseload Reports*. The list item will be enabled when the Generate Reports dialog is active.

8.1.1.1.15 Clinic Activity List Item

Upon selection of the Clinic Activity list item, the system will invoke the Generate Clinic Activity Report dialog described in *Chapter 15 - Operations Reports*. The list item will be enabled when the Generate Reports dialog is active.

8.1.1.1.16 Comparison of Prenatal and Postpartum Certification List Item

Upon selection of the Comparison of Prenatal and Postpartum Certification list item, the system will invoke the Generate Comparison of Prenatal and Postpartum Certification dialog as described *Chapter 15 – Operations Reports*. The list item will be enabled when the Generate Reports dialog is active.

8.1.1.1.17 Dual Enrollment List Item

Upon selection of the Dual Enrollment list item, the system will invoke the Generate Dual Enrollment dialog described in *Chapter 14 – Enrollment Reports*. The list item will be enabled when the Generate Reports dialog is active.

8.1.1.1.18 Enrollees By Age and Race/Ethnicity List Item

Upon selection of the Enrollees By Age and Race/Ethnicity list item, the system will invoke the Generate Enrollees by Age and Race/Ethnicity dialog described in *Chapter 11 – Caseload Reports*. The list item will be enabled when the Generate Reports dialog is active.

8.1.1.1.19 Enrollment Monthly List Item

Upon selection of the Enrollment Monthly list item, the system will invoke the Generate Enrollment Monthly dialog described in *Chapter 11 – Caseload Reports*. The list item will be enabled when the Generate Reports dialog is active.

8.1.1.1.20 Enrollment Unduplicated – Yearly List Item

Upon selection of the Enrollment Unduplicated - Yearly list item, the system will invoke the Generate Enrollment Unduplicated - Yearly dialog described in *Chapter 11 – Caseload Reports*. The list item will be enabled when the Generate Reports dialog is active.

8.1.1.1.21 Estimated Eligible Comparison Reported Participation List Item

Upon selection of the Estimated Eligible Comparison Reported Participation list item, the system will invoke the Generate Estimated Eligible Comparison Reported Participation dialog described in *Chapter 11 – Caseload Reports*. The list item will be enabled when the Generate Reports dialog is active.

8.1.1.1.22 Food Instrument Package Cost List Item

Upon selection of the Food Instrument Package Cost list item, the system will invoke the Generate Food Instrument Package Cost dialog described in *Chapter 11 – Caseload Reports*. The list item will be enabled when the Generate Reports dialog is active.

8.1.1.1.23 Food Instrument Redemption Report List Item

Upon selection of the Food Instrument Redemption Report list item, the system will invoke the Generate Food Instrument Redemption Report dialog described in this document. The list item will be enabled when the Generate Reports dialog is active.

8.1.1.1.24 Food Prescriptions List Item

Upon selection of the Food Prescriptions list item, the system will invoke the Generate Food Prescriptions dialog described in *Chapter 15 – Operations Reports*. The list item will be enabled when the Generate Reports dialog is active.

8.1.1.1.25 Formula Compliance List Item

Upon selection of the Formula Compliance list item, the system will invoke the Generate Formula Compliance dialog described in *Chapter 17 – Nutrition Reports*. The list item will be enabled when the Generate Reports dialog is active.

8.1.1.1.26 Formula Supplementation of Breastfed Infants List Item

Upon selection of the Formula Supplementation of Breastfed Infants list item, the system will invoke the Generate Formula Supplementation of Breastfed Infants dialog described in *Chapter 15 – Operations Reports*. The list item will be enabled when the Generate Reports dialog is active.

8.1.1.1.27 Formula Usage Report List Item

Upon selection of the Formula Usage Report list item, the system will invoke the Generate Formula Usage Report dialog described in this document. The list item will be enabled when the Generate Reports dialog is active.

8.1.1.1.28 Generate PC20XX List Item

Upon selection of the PC20XX list item, the system will invoke the Generate PC20XX File process and display the Generate PC20XX File Status dialog described in this document. The list item will be enabled when the Generate Reports dialog is active.

8.1.1.1.29 Goal Setting List Item

Upon selection of the Goal Setting list item, the system will invoke the Generate Goal Setting dialog described *Chapter 17 – Nutrition Reports*. The list item will be enabled when the Generate Reports dialog is active.

8.1.1.1.30 How Clients Heard about WIC List Item

Upon selection of the How Clients Heard about WIC list item, the system will invoke the Generate How Clients Heard about WIC Report dialog described in this document. The list item will be enabled when the Generate Reports dialog is active.

8.1.1.1.31 Income Eligibility List Item

Upon selection of the Income Eligibility list item, the system will invoke the Generate Income Eligibility dialog described in this document. The list item will be enabled when the Generate Reports dialog is active.

8.1.1.1.32 Ineligibility Summary Report List Item

Upon selection of the Ineligibility Summary Report list item, the system will invoke the Generate Ineligibility Summary Report dialog described in this document. The list item will be enabled when the Generate Reports dialog is active.

8.1.1.1.33 Initial Certification Processing Standards Report List Item

Upon selection of the Initial Certification Processing Standards Report list item, the system will invoke the Generate Initial Certification Processing Standards Report dialog described in this document. The list item will be enabled when the Generate Reports dialog is active.

8.1.1.1.34 List if Dual Participation List Item

Upon selection of the List of Dual Participation list item, the system will invoke the Generate List of Dual Participation List dialog described in *Chapter 14 – Enrollment Reports*. The list item will be enabled when the Generate Reports dialog is active.

8.1.1.1.35 List of Items Paid Without Issuance List Item

Upon selection of the List of Items Paid Without Issuance list item, the system will invoke the Generate List of Items Paid Without Issuance dialog described in *Chapter 16 – Food Instrument Reports*. The list item will be enabled when the Generate Reports dialog is active.

8.1.1.1.36 Medicaid Adjunctive Eligibility List Item

Upon selection of the Medicaid Adjunctive Eligibility list item, the system will invoke the Generate Medicaid Adjunctive Eligibility dialog described in *Chapter 15 – Operations Reports*. The list item will be enabled when the Generate Reports dialog is active.

8.1.1.1.37 Migrant Enrollment List Item

Upon selection of the Migrant Enrollment list item, the system will invoke the Generate Migrant Enrollment dialog described in *Chapter 15 – Operations Reports*. The list item will be enabled when the Generate Reports dialog is active.

8.1.1.1.38 Migrant Participation List Item

Upon selection of the Migrant Participation list item, the system will invoke the Generate Migrant Participation dialog described in *Chapter 15 - Operations Reports*. The list item will be enabled when the Generate Reports dialog is active.

8.1.1.1.39 Minority Health Disparity Survey List Item

Upon selection of the Minority Health Disparity Survey list item, the system will invoke the Generate Minority Health Disparity Survey dialog described in *Chapter 11 – Caseload Reports*. The list item will be enabled when the Generate Reports dialog is active.

8.1.1.1.40 Newly Enrolled Pregnant Women By Trimester List Item

Upon selection of the Newly Enrolled Pregnant Women By Trimester list item, the system will invoke the Generate Newly Enrolled Pregnant Women By Trimester dialog described in *Chapter 15 – Operations Reports*. The list item will be enabled when the Generate Reports dialog is active.

8.1.1.1.41 Non-Participation Reason By Category List Item

Upon selection of the Non-Participation Reason By Category list item, the system will invoke the Generate Non-Participation By Category dialog described in *Chapter 15 – Operations Reports*. The list item will be enabled when the Generate Reports dialog is active.

8.1.1.1.42 Nutrition Education List Item

Upon selection of the Nutrition Education list item, the system will invoke the Generate Nutrition Education dialog described in *Chapter 17 – Nutrition Reports*. The list item will be enabled when the Generate Reports dialog is active.

8.1.1.1.43 Number of Participants Issued Food Instruments List Item

Upon selection of the Number of Participants Issued Food Instruments list item, the system will invoke the Generate Number of Participants Issued Food Instruments dialog described in this document. The list item will be enabled when the Generate Reports dialog is active.

8.1.1.1.44 Nutritional Risk Factors at Certification by Category List Item

Upon selection of the Nutritional Risk Factors at Certification by Category list item, the system will invoke the Generate Nutritional Risk Factors at Certification by Category dialog described in *Chapter 15 – Operations Reports*. The list item will be enabled when the Generate Reports dialog is active.

8.1.1.1.45 One to One Reconciliation Report List Item

Upon selection of the One to One Reconciliation Report list item, the system will display the Generate One to One Reconciliation Report dialog described in this document.

8.1.1.1.46 Outreach Listing Report List Item

Upon selection of the Outreach Listing list item, the system will display the Generate Outreach Listing Report dialog described in this document.

8.1.1.1.47 Participant Insurance Type List Item

Upon selection of the Participant Insurance Type list item, the system will invoke the Generate Participant Insurance Type dialog described in *Chapter 15 – Operations Reports*. The list item will be enabled when the Generate Reports dialog is active.

8.1.1.1.48 Participation Processing Statistics List Item

Upon selection of the Participation Processing Statistics list item, the system will invoke the Generate Participation Processing Statistics dialog described in *Chapter 11 – Caseload Reports*. The list item will be enabled when the Generate Reports dialog is active.

8.1.1.1.49 Prenatals Pending Peer Counselor Contact List Item

Upon selection of the Prenatals Pending Peer Counselor Contact list item, the system will invoke the Generate Prenatals Pending Peer Counselor Contact Report dialog described in *Chapter 05 – Breastfeeding Peer Counselor Reports*. The list item will be enabled when the Generate Reports dialog is active.

8.1.1.1.50 Redeemed Food Instruments/Expenditures List Item

Upon selection of the Redeemed Food Instruments/Expenditures list item, the system will invoke the Generate Redeemed Food Instruments/Expenditures dialog described in *Chapter 11 – Caseload Reports*. The list item will be enabled when the Generate Reports dialog is active.

8.1.1.1.51 Redeemed Participation High Risk Priority Goal List Item

Upon selection of the Redeemed High Risk Priority Goal list item, the system will invoke the Generate Redeemed High Risk Priority Goal dialog described in *Chapter 11 – Caseload Reports*. The list item will be enabled when the Generate Reports dialog is active.

8.1.1.1.52 Redeemed Participation Priority Summary List Item

Upon selection of the Redeemed Participation Priority Summary list item, the system will invoke the Generate Redeemed Participation Priority Summary dialog described in *Chapter 11 – Caseload Reports*. The list item will be enabled when the Generate Reports dialog is active.

8.1.1.1.53 Redeemed Participation Unduplicated - Yearly List Item

Upon selection of the Redeemed Participation Unduplicated - Yearly list item, the system will invoke the Generate Redeemed Participation Unduplicated - Yearly dialog described in *Chapter 11 – Caseload Reports*. The list item will be enabled when the Generate Reports dialog is active.

8.1.1.1.54 Redeemed Participation WIC - Unduplicated List Item

Upon selection of the Redeemed Participation WIC - Unduplicated list item, the system will invoke the Generate Redeemed Participation WIC - Unduplicated dialog described in this document. The list item will be enabled when the Generate Reports dialog is active.

8.1.1.1.55 Redeemed Participation Monthly List Item

Upon selection of the Redeemed Participation Monthly list item, the system will invoke the Generate Redeemed Participation Monthly dialog described in *Chapter 11 – Caseload Reports*. The list item will be enabled when the Generate Reports dialog is active.

8.1.1.1.56 Referrals from WIC to Outside Agencies List Item

Upon selection of the Referrals from WIC to Outside Agencies list item, the system will invoke the Generate Referrals from WIC to Outside Agencies Report dialog described in this document. The list item will be enabled when the Generate Reports dialog is active.

8.1.1.1.57 Reported Participation High Risk Outreach List Item

Upon selection of the Reported Participation High Risk Outreach list item, the system will invoke the Generate Reported Participation High Risk Outreach dialog described in *Chapter 11 – Caseload Reports*. The list item will be enabled when the Generate Reports dialog is active.

8.1.1.1.58 Reported Participation Monthly List Item

Upon selection of the Reported Participation Monthly list item, the system will invoke the Generate Reported Participation Monthly dialog described in *Chapter 11 – Caseload Reports*. The list item will be enabled when the Generate Reports dialog is active.

8.1.1.1.59 Reported Participation Unduplicated - Yearly List Item

Upon selection of the Reported Participation Unduplicated - Yearly list item, the system will invoke the Generated Reported Participation Unduplicated - Yearly dialog described in *Chapter 11 – Caseload Reports*. The list item will be enabled when the Generate Reports dialog is active.

8.1.1.1.60 Reported Participation WIC - Unduplicated List Item

Upon selection of the Reported Participation WIC - Unduplicated list item, the system will invoke the Generate Reported Participation WIC - Unduplicated dialog described in this document. The list item will be enabled when the Generate Reports dialog is active.

8.1.1.1.61 Staff Activity List Item

Upon selection of the Staff Activity list item, the system will invoke the Generate Staff Activity Report dialog described in *Chapter 11 – Caseload Reports*. The list item will be enabled when the Generate Reports dialog is active.

8.1.1.1.62 Statewide Education Summary List Item

Upon selection of the Statewide Education Summary list item, the system will invoke the Generate Statewide Education Summary dialog described in *Chapter 17 – Nutrition Reports*. The list item will be enabled when the Generate Reports dialog is active.

8.1.1.1.63 Survey Results List Item

Upon selection of the Survey Results list item, the system will invoke the Generate Survey Results Report dialog described in *Chapter 15 - Operations Reports*. The list item will be enabled when the Generate Reports dialog is active.

8.1.1.1.64 Special Formula List Item

Upon selection of the Special Formula list item, the system will invoke the Generate Special Formula dialog described in *Chapter 15 – Operations Reports*. The list item will be enabled when the Generate Reports dialog is active.

8.1.1.1.65 Special Formula Prescription Expiration Date Report List Item

Upon selection of the Special Formula Prescription Expiration Date Report list item, the system will invoke the Generate Special Formula Rx Expiration Date Report dialog described in this document. The list item will be enabled when the Generate Reports dialog is active.

8.1.1.1.66 Unduplicated Enrollment – Yearly (Calendar Year) List Item

Upon selection of the Unduplicated Enrollment – Yearly (Calendar Year) list item, the system will invoke the Generate Unduplicated Enrollment – Yearly (Calendar Year) dialog described in *Chapter 11 – Caseload Reports*. The list item will be enabled when the Generate Reports dialog is active.

8.1.1.1.67 Unduplicated Enrollment – Yearly (Federal Fiscal Year) List Item

Upon selection of the Unduplicated Enrollment – Yearly (Federal Fiscal Year) list item, the system will invoke the Generate Unduplicated Enrollment – Yearly (Federal Fiscal Year) dialog described in *Chapter 11 – Caseload Reports*. The list item will be enabled when the Generate Reports dialog is active.

8.1.1.1.68 Unduplicated Enrollment – Yearly (State Fiscal Year) List Item

Upon selection of the Unduplicated Enrollment – Yearly (State Fiscal Year) list item, the system will invoke the Generate Unduplicated Enrollment – Yearly (State Fiscal Year) dialog described *Chapter 11 – Caseload Reports*. The list item will be enabled when the Generate Reports dialog is active.

8.1.1.1.69 Voided Food Instruments List Item

Upon selection of the Voided Food Instruments list item, the system will invoke the Generate Voided Food Instruments dialog described in *Chapter 16 – Food Instrument Reports*. The list item will be enabled when the Generate Reports dialog is active.

8.1.1.1.70 Waiting List Summary Report List Item

Upon selection of the Waiting List Summary Report list item, the system will invoke the Generate Waiting List Summary Report dialog described in this document.

8.1.1.1.71 WIC Reported Participation (per FNS-798) List Item

Upon selection of the WIC Reported Participation (per FNS-798) list item, the system will invoke the Generate WIC Reported Participation (per FNS-798) dialog described in Chapter 15 – Operations Reports. The list item will be enabled when the Generate Reports dialog is active.

8.1.1.2 Close Button

This control allows the user to exit the Generate Reports dialog. The Close button will be enabled when the Generate Reports dialog is active. Characteristics for the Close button are defined in *Consistencies*.

8.2 Referrals from WIC to Outside Agencies Dialog

This dialog will allow the user to generate a report on referrals from WIC to external agencies. This dialog is invoked when the user selects the Referrals Summary function on the System Outputs -Generate Reports dialog.

Figure 2 – Generate Referrals from WIC to Outside Agencies Dialog

8.2.1 Controls

8.2.1.1 Clinic(s) List Box

The Clinic(s) list box allows the user to select from a list of Clinic names. The control will be enabled when the dialog is active. The Clinic list will display all Clinics listed in the ServiceSite entity. The entries will appear in numerical order by Clinic ID. No Clinics will be highlighted initially. Single and multiple selections are allowed. De-selection is allowed.

At least one Clinic selection is required.

8.2.1.2 From Date Masked Edit Box (From)

This control will allow the user to specify the start date of the date range on which to filter the Referrals from WIC to Outside Agencies report. The masked edit box will be enabled when the dialog is active. The mask on the box will be "##/##/####" to accept a date with a four digit year. The masked edit box will initially be blank.

The string entered must represent a valid date in the format of MM/DD/CCYY. If an invalid date is entered, the system will invoke a standard error message with the text of "Invalid date entered."

The date entered must be equal to or less than the current system date or the system will invoke a standard error message with the text of "Date entered must be equal to or less than today's date."

8.2.1.3 To Date Masked Edit Box (To)

This control will allow the user to specify the end date of the date range on which to filter the Referrals from WIC to Outside Agencies report. The masked edit box will be enabled when the dialog is active. The mask on the box will be "##/##/####" to accept a date with a four digit year. The masked edit box will initially be blank.

The string entered must represent a valid date in the format of MM/DD/CCYY. If an invalid date is entered, the system will invoke a standard error message with the text of "Invalid date entered."

The date entered must be equal to or less than the current system date or the system will invoke a standard error message with the text of "Date entered must be equal to or less than today's date."

8.2.1.4 Report Destination Radio Button

This control allows the user to select either Display on Screen, Send to Printer or Save as PDF. The control will be enabled when the dialog is enabled. It will default to Display on Screen.

8.2.1.5 OK Button

This control will allow the user to instruct the system to edit the values of the controls on the form, generate the report, and exit the dialog. The OK button will be enabled when the dialog is active. (See *Saving the Data* in the Processing section below). Characteristics for the OK button are defined in *Consistencies*.

8.2.1.6 Cancel Button

This control will allow the user to exit the dialog without generating a report. The Cancel button will be enabled when the dialog is active. Characteristics for the Cancel button are defined in *Consistencies*.

8.2.2 Processes

8.2.2.1 Initializing the Interface

Upon initial presentation of the dialog:

- The title bar text will be set to "Generate Referrals from WIC to Outside Agencies Report"
- All Clinics will be displayed in the Clinic(s) list box in numeric order by Clinic ID and no clinic is initially selected
- The Date Range From masked edit box will be initially blank.
- The Date Range To masked edit box will be initially blank.
- The Report Destination will default to Display on Screen radio button.

8.2.2.2 Edits

Upon selection of the OK button:

- If at least one selection is not made in the Clinic(s) list box, the system will invoke a standard error message with the text "A selection is required in the {name of control}."
- If an entry is not made in the Date Range From masked edit box, the system will invoke a standard error message with the text "An entry is required for the {name of control}."
- The date entered in the Date Range From masked edit box must be equal to or less than the current system date or the system will invoke a standard error message with the text "Date entered must be less than or equal to today's date."
- The date entered in the Date Range From masked edit box must represent a valid date in the format of MM/DD/CCYY. If an invalid date is entered, the system will invoke a standard error message with the text "Invalid date entered."
- If an entry is not made in the Date Range To masked edit box, the system will invoke a standard error message with the text "An entry is required for the {name of control}."
- The date entered in the Date Range To masked edit box must be equal to or less than the current system date or the system will invoke a standard error message with the text "Date entered must be less than or equal to today's date."
- The date entered in the Date Range To masked edit box must represent a valid date in the format of MM/DD/CCYY. If an invalid date is entered, the system will invoke a standard error message with the text "Invalid date entered."
- The Date Range From masked edit box value must be equal to or less than the value of the Date Range To masked edit box. If the Date Range From masked edit box value is not equal to or less than the Date Range To masked edit box value, the system will invoke a standard error message with the text "Beginning of date range must be equal to or less than end of date range."

8.2.2.3 Generate Referrals from WIC to Outside Agencies Report

Upon successful completion of the edits listed above, the system will generate the Referrals from WIC to Outside Agencies report to the selected report destination:

- If Report Destination is Screen, the system will display the report on the screen.
- If Report Destination is Printer, the system will generate the report and send it to the selected other output printer (see *System Tools*).
- If Report Destination is PDF, the system will invoke the "Save As" dialog. The user can select the folder and enter the file name, or cancel. Upon entering a file name and selecting Save, the system will save the file to the selected folder.

8.3 Referrals from WIC to Outside Agencies Report (Output) OPR021

This report will allow the user to print a summary report of referral sources as to whom the participant was referred for services.

Referrals from WIC To Outside Agencies Report

```
OPR021
 SYSTEM NAME        REFERRALS FROM WIC TO OUTSIDE AGENCIES   2/27/1997
 DON USER                        01/15/1997 - 02/15/1997              12:30:00
                                                                      PAGE   1


CLINIC:  07 – MAIN STREET WIC CLINIC

      REFERRAL                                     REFERRAL
        DATE          REFERRED CLINIC              LEVEL   QUANTITY
      ----------  ----------------------------------  ----------  -------
      01/30/1997 FOOD STAMPS                          STATE        9
                 MATERNAL AND CHILD HEALTH            STATE       35
                 UTILITIES ASSISTANCE                 LOCAL       98
                                                                -------
                                                                  142

      02/03/1997 MATERNAL AND CHILD HEALTH            STATE       12
                 UTILITIES ASSISTANCE                 LOCAL      104
                                                                -------
                                                                  116


      TOTAL FOR CLINIC: MAIN STREET                      258

<<PAGE BREAK BEFORE NEXT CLINIC FOR STATE REPORT>>
<<REPEAT CLINIC FOR NEXT SITE IN SORTED ORDER>>


STATE TOTALS
         REFERRED CLINIC              QUANTITY
 ----------------------------------  --------
 FOOD STAMPS                             9
 MATERNAL AND CHILD HEALTH              47
```
UTILITIES ASSISTANCE   202

   TOTAL FOR REPORT   258

8.3.1 Data Elements

8.3.1.1 Report Title

The title of the report will be the text of "Referrals from WIC To Outside Agencies". A subtitle will indicate the date range selected for the report.

8.3.1.1.1 Origin of Data Element

The report date will be selected by the user on the Referrals from WIC To Outside Agencies dialog described in this chapter.

8.3.1.1.2 Format

The date values will appear in MM/DD/CCYY format.

8.3.1.2 Clinic Name

This value will be one of the Clinics the user selected on the Generate Referrals from WIC To Outside Agencies Report dialog described in this chapter.

8.3.1.2.1 Origin of Data Element

The value will be taken from the Service-Site-ID attribute and Service-Site-Name attribute of the SERVICE-SITE table in the reference dictionary for the Clinic the user selected.

8.3.1.2.2 Format

The value will appear as its literal value.

8.3.1.3 Referral Date

Each referral date will have its own section and total.

8.3.1.3.1 Origin of Data Element

The value will be taken from the Referral-Contact-Date attribute of the REFERRAL-CONTACT entity.

8.3.1.3.2 Format

The value will appear in MM/DD/CCYY format.

8.3.1.4 Referred Agencies

This value will be the name of the state agencies that have been referred.

8.3.1.4.1 Origin of Data Element

The value will be taken from the Referral-Contact-State-Or-Local-Identifier attribute of the REFERRAL-CONTACT entity. Only state agencies will be listed.

8.3.1.4.2 Format

The value will appear in its literal format.

8.3.1.5 Count

This value will be a calculated from the number of referrals.

8.3.1.5.1 Origin of Data Element

The value will be taken from the record count where the Referral-Contact-Clinic-Code and Referral-Contact-State-Or-Local-Identifier and Referral-Contact-Date attributes of the REFERRAL-CONTACT entity are matching.

8.3.1.5.2 Format

The value will appear in #,### format.

8.3.2 Filter Criteria

8.3.2.1 Clinic Selection

The selection criteria will allow for selection of Clinics to limit the report to only participants designated for those sites. Multiple selections will be supported.

8.3.2.2 Date Range of Referral Contact

The selection criteria will allow for entry of a beginning and ending range of dates. These will be used to limit the referral items to those where the referral contact date falls between the user-entered beginning and ending date.

8.3.3 Sort Order

8.3.3.1 Clinic

The report will first be sorted by Clinic ID.

8.3.3.2 Referral Date

The report will be sorted by referral date within Clinic.

8.3.3.3 Referred Clinic Name

The report will be sorted by referral name within referral date also within Clinic.

8.3.4 Control Break

8.3.4.1 Clinic

On a change of Clinic, a sum of the referrals for that site will be printed and a page break will occur.

8.3.4.2 Referral Date

On a change of referral date, a sum of the referrals for that date will be printed and a multiple line break will occur.

8.3.5 Grand Total

8.3.5.1 Summary of Referrals

A summary count of the number of referrals to each according to the filter criteria will be included at the end of the report. Referrals to related agencies that were defined by the State, local agencies and clinics will be grouped together.

8.3.5.2 Count of Referrals

A final summary count of the number of referrals according to the filter criteria will be included at the end of the report.

8.4 How Clients Heard about WIC Dialog

This dialog will allow the user to generate a report on how clients heard about
WIC. This dialog is invoked when the user selects the How Clients Heard about
WIC function on the System Outputs -Generate Reports dialog.

Figure 3 – Generate How Clients Heard about WIC Dialog

8.4.1 Controls

8.4.1.1 Clinic(s) List Box

The Clinic(s) list box allows the user to select from a list of Clinic names.
The control will be enabled when the dialog is active. The Clinic list will
display all Clinics listed in the ServiceSite entity. The entries will appear
in numerical order by Clinic ID No Clinics will be highlighted initially.
Single and multiple selections are allowed. De-selection is allowed.

Selection of a Clinic is required.

8.4.1.2 From Date Masked Edit Box (From)

This control will allow the user to specify the start date of the date range
on which to filter the How Clients Heard about WIC report. The masked
edit box will be enabled when the dialog is active. The mask on the box
will be "##/##/####" to accept a date with a four digit year. The masked
edit box will initially be blank.

Entry is required

The string entered must represent a valid date in the format of
MM/DD/CCYY. If an invalid date is entered, the system will invoke a
standard error message with the text of "Invalid date entered".

The date entered must be equal to or less than the current system date or
the system will invoke a standard error message with the text of "Date
entered must be less than or equal to today's date".

8.4.1.3 To Date Masked Edit Box (To)

This control will allow the user to specify the end date of the date range
on which to filter the How Clients Heard about WIC report. The masked
edit box will be enabled when the dialog is active. The mask on the box
will be "##/##/####" to accept a date with a four digit year. The masked
edit box will initially be blank.

Entry is required.

The string entered must represent a valid date in the format of
MM/DD/CCYY. If an invalid date is entered, the system will invoke a
standard error message with the text of "Invalid date entered."

The date entered must be equal to or less than the current system date or
the system will invoke a standard error message with the text of "Date
entered must be less than or equal to today's date".

8.4.1.4 Report Destination Radio Button

This control allows the user to select either Display on Screen, Send to
Printer or Save as PDF. The control will be enabled when the dialog is
enabled. It will default to Display on Screen.

8.4.1.5 OK Button

This control will allow the user to instruct the system to edit the values of
the controls on the form, generate the report, and exit the dialog. The OK
button will be enabled when the dialog is active. (See *Saving the Data* in
the Processing section below). Characteristics for the OK button are
defined in *Consistencies*.

8.4.1.6 Cancel Button

This control will allow the user to exit the dialog without generating a
report. The Cancel button will be enabled when the dialog is active.
Characteristics for the Cancel button are defined in *Consistencies*.

8.4.2 Processes

8.4.2.1 Initializing the Interface

Upon initial presentation of the dialog:

- The title bar text will be set to "Generate How Clients Heard about WIC Report"
- All Clinics will be displayed in the Clinic(s) list box in numeric order by Clinic ID and no clinic is initially selected
- The Date Range From masked edit box will be initially blank.
- The Date Range To masked edit box will be initially blank.
- The Report Destination will default to Display on Screen radio button.

8.4.2.2 Edits

Upon selection of the OK button:

- If at least one selection is not made in the Clinic(s) list box, the system will invoke a standard error message with the text "A selection is required in the {name of control}."
- If an entry is not made in the Date Range From masked edit box, the system will invoke a standard error message with the text "An entry is required for the {name of control}."
- The date entered in the Date Range From masked edit box must be equal to or less than the current system date or the system will invoke a standard error message with the text "Date entered must be less than or equal to today's date."
- The date entered in the Date Range From masked edit box must represent a valid date in the format of MM/DD/CCYY. If an invalid date is entered, the system will invoke a standard error message with the text "Invalid date entered."
- If an entry is not made in the Date Range To masked edit box, the system will invoke a standard error message with the text "An entry is required for the {name of control}."
- The date entered in the Date Range To masked edit box must be equal to or less than the current system date or the system will invoke a standard error message with the text "Date entered must be less than or equal to today's date."
- The date entered in the Date Range To masked edit box must represent a valid date in the format of MM/DD/CCYY. If an invalid date is entered, the system will invoke a standard error message with the text "Invalid date entered."
- The Date Range From masked edit box value must be equal to or less than the value of the Date Range To masked edit box. If the Date Range From masked edit box value is not equal to or less than the Date Range To masked edit box value, the system will invoke a standard error message with the text "Beginning of date range must be equal to or less than end of date range."

8.4.2.3 Generate How Clients Heard about WIC Report

Upon successful completion of the edits listed above, the system will generate the How Clients Heard about WIC report to the selected report destination:

- If Report Destination is Screen, the system will display the report on the screen.
- If Report Destination is Printer, the system will generate the report and send it to the selected other output printer (see *System Tools*).
- If Report Destination is PDF, the system will invoke the "Save As" dialog. The user can select the folder and enter the file name, or cancel. Upon entering a file name and selecting Save, the system will save the file to the selected folder.

8.5 How Clients Heard about WIC Report (Output) OPR022

This report will allow the user to print a summary report of referral sources as to how the client was referred to WIC.

How Clients Heard about WIC Report

```
OPR022
 SYSTEM NAME            HOW CLIENTS HEARD ABOUT WIC               2/27/1997
 DON USER                  01/30/1997 - 02/28/1997               12:30:00
                                                                 PAGE   1


CLINIC:  07 – MAIN STREET WIC CLINIC

                         REFERRING CLINIC          QUANTITY
                       ----------------------------------  --------
                         DOCTOR'S OFFICE                  9
                         FRIEND                          35
                         OTHER HEALTH SERVICES           98
                         RADIO ADVERTISEMENT             12
                                                      --------
                         SUBTOTAL FOR CLINIC            154

<<PAGE BREAK BEFORE NEXT CLINIC FOR STATE REPORT>>

<<REPEAT CLINIC FOR NEXT SITE IN SORTED ORDER>>

                         TOTAL FOR REPORT              258
```

8.5.1 Data Elements

8.5.1.1 Report Title

The title of the report will be the text of "How Clients Heard about WIC". A subtitle will indicate the date range selected for the report.

8.5.1.1.1 Origin of Data Element

The report date will be selected by the user on the How Clients Heard about WIC dialog described in this chapter.

8.5.1.1.2 Format

The date values will appear in MM/DD/CCYY format.

8.5.1.2 Clinic Name

This value will be one of the Clinics the user selected on the How Clients Heard about WIC dialog described in this chapter.

8.5.1.2.1 Origin of Data Element

The value will be taken from the Service-Site-ID attribute and Service-Site-Name attribute of the SERVICE-SITE table for the Clinic the user selected.

8.5.1.2.2 Format

The value will appear as its literal value.

8.5.1.3 Referring Clinic

This value will be the name of the agencies that have been referred.

8.5.1.3.1 Origin of Data Element

The value will be taken from the Referral-Contact-State-Or-Local-Identifier attribute of the REF_CONTACT table.

8.5.1.3.2 Format

The value will appear in its literal format.

8.5.1.4 Quantity

This value will be a calculation based on records meeting specific criteria.

8.5.1.4.1 Origin of Data Element

The value will be taken from the record count where the Household -Member-Application-Date in the MEMBER table and Household-Member-How-Heard-About-WIC in the HOUSEHOLD table meet the report parameters.

8.5.1.4.2 Format

The value will appear in #,### format.

8.5.2 Filter Criteria

8.5.2.1 Clinic

The participant must be enrolled at one of the Clinics selected in the report dialog.

8.5.2.2 Application Date

The participant's date of application must fall within the selected beginning and ending range entered in the report dialog.

8.5.3 Sort Order

8.5.3.1 Clinic

The report will be sorted first by Clinic.

8.5.3.2 Referral Name

The report will be sorted by referral name within Clinic.

8.5.4 Control Break

8.5.4.1 Clinic

On a change of Clinic, a sum of the referrals for that site will be printed and a page break will occur.

8.5.5 Grand Total

8.5.5.1 Count of Referrals

A final summary count of the number of referrals according to the filter criteria will be included at the end of the report.

8.6 Waiting List Summary Dialog

This dialog will allow the user to generate a report of participants who are on the waiting list for WIC participation. This dialog is invoked when the user selects the Waiting List Summary Report option on the System Outputs -Generate Reports dialog
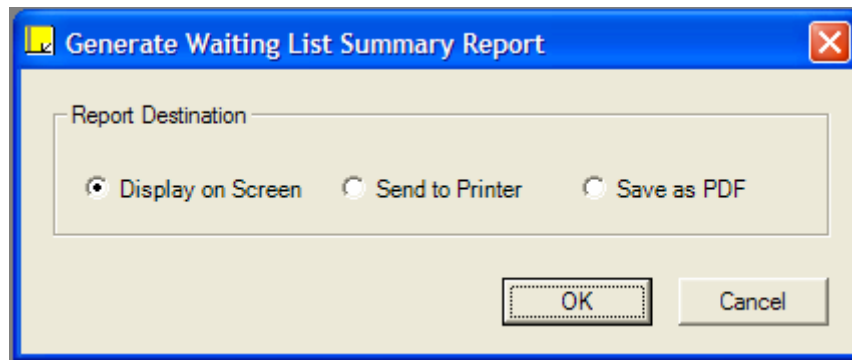
Figure 4 – Generate Waiting List Summary Report Dialog

8.6.1 Controls

8.6.1.1 Report Destination Radio Button

This control allows the user to select either Display on Screen, Send to Printer or Save as PDF. The control will be enabled when the dialog is enabled. It will default to Display on Screen.

8.6.1.2 OK Button

This control allows the user to instruct the system to edit the values of the controls, generate the report, and exit the Waiting List Summary Report dialog. The OK button will be enabled when the Waiting List Summary Report dialog is active. Characteristics for the OK button are defined in *Consistencies*.

8.6.1.3 Cancel Button

This control allows the user to exit the Waiting List Summary Report dialog without generating a report. The Cancel button will be enabled when the Waiting List Summary Report dialog is active. Characteristics for the Cancel button are defined in *Consistencies*.

8.6.2 Processes

This section describes the processes (navigation) that take place as a result of the actions taken on the Waiting List Summary Report dialog.

8.6.2.1 Initializing the Interface

Upon initial presentation of the dialog:

- The title bar text will be set to "Generate Waiting List Summary Report"
- The Report Destination will default to Display on Screen radio button.

8.6.2.2 Edits

There are no edits defined for this dialog.

8.6.2.3 Generate Waiting List Summary Report

Upon selecting the OK button, the system will generate the Waiting List Summary Report to the selected report destination:

- If Report Destination is Screen, the system will display the report on the screen.
- If Report Destination is Printer, the system will generate the report and send it to the selected other output printer (see *System Tools*).
- If Report Destination is PDF, the system will invoke the "Save As" dialog. The user can select the folder and enter the file name, or cancel. Upon entering a file name and selecting Save, the system will save the file to the selected folder.

8.7 Waiting List Summary Report (Output) OPR023

This report will allow the user to print a summary report of participants who are on the waiting list for WIC participation.

Waiting List Summary Report

```
OPR023
SYSTEM NAME           WAITING LIST SUMMARY REPORT              2/27/1997
DON USER                                                       12:30:00
                                                               PAGE   1


CLINIC: 07 - MAIN STREET WIC CLINIC

                +------------------- WIC CATEGORY ---------------+
                +---------- WOMEN ---------+   INFANT   CHILD
      PRIORITY      P         B         N        I         C          TOTAL
----------------- ------    ------    ------   ------    ------     -------
PRIORITY 1          0         0                  0                       0
PRIORITY 2                                       0                       0
PRIORITY 3                                                 0             0
PRIORITY 4         234       921                124                  1,279
PRIORITY 5                                               1,342       1,342
PRIORITY 6                             10,721                       10,721
                 ------    ------    ------   ------    ------     -------
   SUBTOTAL        234       921      10,721    124      1,342      13,342

<<PAGE BREAK BEFORE CHANGE OF CLINIC>>

<<PAGE BREAK BEFORE CHANGE OF CLINIC>>

<<PAGE BREAK BEFORE GRAND TOTAL FOR STATE WHEN STATE EXECUTED>>

GRAND TOTAL

                +------------------- WIC CATEGORY ---------------+
                +---------- WOMEN ---------+   INFANT   CHILD
      PRIORITY      P         B         N        I         C          TOTAL
----------------- ------    ------    ------   ------    ------     -------
PRIORITY 1          0         0                  0                       0
PRIORITY 2                                       0                       0
PRIORITY 3                                                 0             0
PRIORITY 4        1,434     3,921               4,424                9,779
PRIORITY 5                                               7,382       7,382
PRIORITY 6                             30,721                       30,721
                 ------    ------    ------   ------    ------     -------
   TOTAL          1,434     3,921     30,721   4,424     7,382      47,882
```

8.7.1 Data Elements

8.7.1.1 Report Title

The title of the report will be the text of "Waiting List Summary Report".

8.7.1.1.1 Origin of Data Element

This is a literal value and will come from a constant repository.

8.7.1.1.2 Format

The value will appear as its literal value.

8.7.1.2 Clinic Name

This value will be the Clinic that has the participants who are on the Waiting List.

8.7.1.2.1 Origin of Data Element

The value will be taken from the Service-Site-ID attribute and Service-Site-Name attribute of the SERVICE-SITE table in the reference dictionary for the Clinic the user selected.

8.7.1.2.2 Format

The value will appear as its literal value.

8.7.1.3 Counts

The value for this data is the number of participants meeting the attribute parameters.

8.7.1.3.1 Origin of Data Element

The value will be the number of participants that have Household-Member-WIC-Status-Code attributes in the HOUSEHOLD-MEMBER entity that match the attribute type and Certification-Contact-Assigned-Priority attribute in the CERTIFICATION-CONTACT entity that match the row type.

8.7.1.3.2 Format

The value will appear in #,### format.

8.7.2 Filter Criteria

8.7.2.1 Waitlisted Participants

Participants with a valid wait list record (WAITING-LIST-MEMBER entity) for their HOUSEHOLD-MEMBER entity will be candidates for this report.

8.7.3 Sort Order

8.7.3.1 Clinic

The report will be sorted first by Clinic ID.

8.7.3.2 Priority

The report will be sorted by priority within Clinic.

8.7.3.3 Category

The report will be sorted by category within priority within Clinic.

8.7.4 Control Break

8.7.4.1 Clinic

On a change of Clinic, a page break will occur.

8.7.5 Grand Total

8.7.5.1 Count of Waitlisted Participants by Priority and WIC Category

Final summary counts of the number of waitlisted participants will be included. It will be categorized by priority and WIC Category groups. Totals of each WIC Category across all priorities and of each priority across all WIC Categories will be included. Please see the sample report in this chapter for a better understanding of the grand total.

8.8 Ineligibility Summary Dialog

This dialog will allow the user to generate a report on ineligible participants based upon Clinic. This dialog is invoked when the user selects the Ineligibility Summary Report function on the System Outputs -Generate Reports dialog.
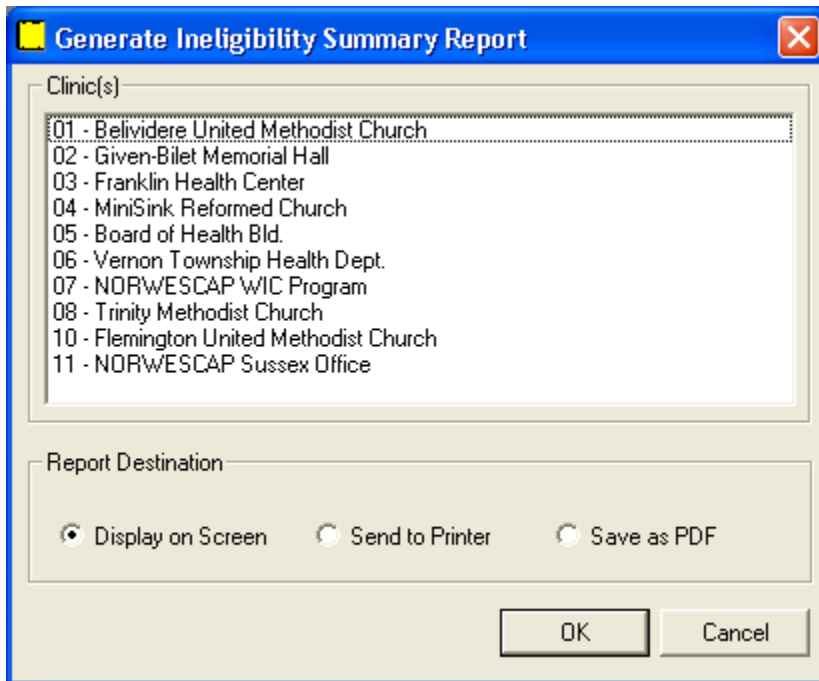
Figure 5 – Generate Ineligibility Summary Report Dialog

8.8.1 Controls

8.8.1.1 Clinic(s) List Box

The Clinic(s) list box allows the user to select from a list of Clinic names. The control will be enabled when the dialog is active. The Clinic list will display all Clinics listed in the ServiceSite entity. The entries will be listed in numeric order sorted by Clinic ID. No Clinics will be highlighted initially. Single and multiple selections are allowed. De-selection is allowed.

Selection of at least one Clinic is required.

8.8.1.2 Report Destination Radio Button

This control allows the user to select either Display on Screen, Send to Printer or Save as PDF. The control will be enabled when the dialog is enabled. It will default to Display on Screen.

8.8.1.3 OK Button

This control will allow the user to instruct the system to edit the values of the controls on the form, generate the report, and exit the dialog. The OK button will be enabled when the dialog is active. (See *Saving the Data* in the Processing section below). Characteristics for the OK button are defined in *Consistencies*.

8.8.1.4 Cancel Button

This control will allow the user to exit the dialog without generating a report. The Cancel button will be enabled when the dialog is active. Characteristics for the Cancel button are defined in *Consistencies*.

8.8.2 Processes

8.8.2.1 Initializing the Interface

Upon initial presentation of the dialog:

- The title bar text will be set to "Generate Ineligibility Summary Report"
- All Clinics will be displayed in the Clinic(s) list box in numeric order by Clinic ID and no clinic is initially selected
- The Report Destination will default to Display on Screen radio button.

8.8.2.2 Edits

Upon selection of the OK button:

- If at least one selection is not made in the Clinic(s) list box, the system will invoke a standard error message with the text "A selection is required in the {name of control}."

8.8.2.3 Generate Ineligible Summary Report

Upon successful completion of the edits listed above, the system will generate the Ineligibility Summary report to the selected report destination:

- If Report Destination is Screen, the system will display the report on the screen.
- If Report Destination is Printer, the system will generate the report and send it to the selected other output printer (see *System Tools*).
- If Report Destination is PDF, the system will invoke the "Save As" dialog. The user can select the folder and enter the file name, or cancel. Upon entering a file name and selecting Save, the system will save the file to the selected folder.

8.9 Ineligibility Summary Report (Output) OPR024

This report will allow the user to print a summary report of participants who are deemed ineligible for WIC services during a certification attempt.

Ineligibility Report

```
OPR024
 SYSTEM NAME                    INELIGIBILITY REPORT              2/27/1997
 DON USER                                                         12:30:00
                                                                  PAGE   1


CLINIC: 07 - MAIN STREET WIC CLINIC

                                           WIC
              INELIGIBILITY REASON       CATEGORY      COUNT
          ------------------------------  ------     --------
          OUTSIDE OF INCOME GUIDELINES       P           43
                                             B          567
                                             N           54
                                             I           23
                                             C           64
                                                       --------
              SUBTOTAL                                    751

          CHILDREN NO LONGER ELIGIBLE        C           43
                                                       --------
              SUBTOTAL                                     43
CLINIC SUBTOTAL FOR MAIN STREET:                         794

<<PAGE BREAK BEFORE NEXT CLINIC>>
```

8.9.1 Data Elements

8.9.1.1 Report Title

The title of the report will be the text of "Ineligibility Report".

8.9.1.1.1 Origin of Data Element

This is a literal value and will come from a constant repository.

8.9.1.1.2 Format

The value will appear as its literal value.

8.9.1.2 Clinic Name

This value will be one of the Clinics the user selected on the Generate Ineligibility Summary Report dialog described in this chapter.

8.9.1.2.1 Origin of Data Element

The value will be taken from the Service-Site-ID attribute and Service-Site-Name attribute of the SERVICE-SITE table in the reference dictionary for the Clinic the user selected.

8.9.1.2.2 Format

The value will appear as its literal value.

8.9.1.3 Ineligibility Reason

This value is the reason why the persons counted were ineligible.

8.9.1.3.1 Origin of Data Element

The literal value will be stored in the REFDICT entity the data represented on the screen will be referencing the Certification-Contact-Ineligibility-Reason-Code attribute found within the CERTIFICATION-CONTACT entity.

8.9.1.3.2 Format

The value will appear in #,### format.

8.9.1.4 WIC Category

This value is the participant's category.

8.9.1.4.1 Origin of Data Element

The value referenced to attain the Count field will be the Certification-Contact-WIC-Status-Code attribute in the CERTIFICATION-CONTACT entity.

8.9.1.4.2 Format

The value will appear as its literal value.

8.9.1.5 Count

This value is the number of participants meeting the row parameters.

8.9.1.5.1 Origin of Data Element

This value will be the number of records that meet the above classifications.

8.9.1.5.2 Format

The value will appear in #,### format.

8.9.2 Filter Criteria

8.9.2.1 Clinic

The client must be enrolled at one of the Clinics selected in the report dialog.

8.9.3 Sort Order

8.9.3.1 Clinic

The report will be sorted first by Clinic ID.

8.9.3.2 Ineligibility Reason

The report will be sorted by ineligibility reason within Clinic.

8.9.4 Control Break

8.9.4.1 Clinic

On a change of Clinic, a sum of ineligible participants will occur and a page break will occur.

8.9.4.2 Ineligibility Reason

On a change of reason, a sum of ineligible participants will occur.

8.9.5 Grand Total

8.9.5.1 Count of Ineligible Participants

A final summary count of the number of participants no longer eligible for benefits according to the filter criteria will be included at the end of the report.

8.10 Special Formula Prescription Expiration Date Report Dialog

The Special Formula Prescription Expiration Date Report dialog allows the user to generate a report that lists the special formula prescriptions that are expiring within a specified time range. It is invoked when the user selects the Special Formula Prescription Expiration Date list item from the Generate Reports dialog.
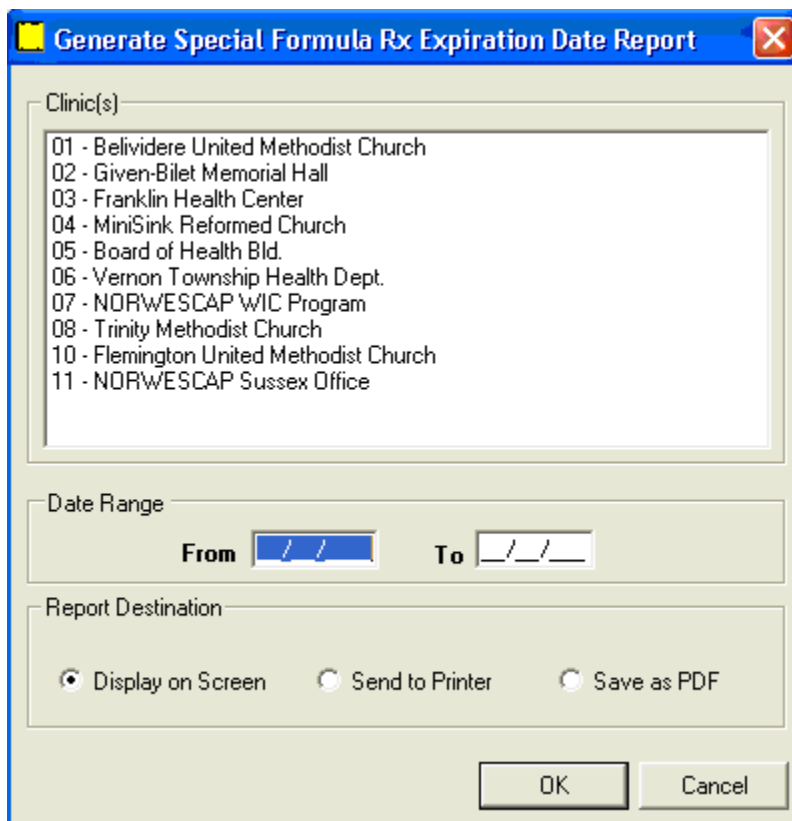
Figure 6 - Generate Special Formula Rx Expiration Date Report Dialog

8.10.1 Controls

8.10.1.1 Clinic(s) List Box

The Clinic(s) list box allows the user to select from a list of Clinic names. The control will be enabled when the dialog is active. The Clinic list will display all Clinics listed in the ServiceSite entity. The entries will appear in numerical order by Clinic ID. No Clinics will be highlighted initially. Single and multiple selections are allowed. De-selection is allowed.

At least one Clinic selection is required.

8.10.1.2 From Date Masked Edit Box (From)

This control will allow the user to specify the start date of the date range on which to filter the Generate Special Formula Rx Expiration Date report. The masked edit box will be enabled when the dialog is active. The mask on the box will be "##/##/####" to accept a date with a four digit year. The masked edit box will initially be blank.

The string entered must represent a valid date in the format of MM/DD/CCYY. If an invalid date is entered, the system will invoke a standard error message with the text of "Invalid date entered."

The date entered must be equal to or less than the current system date or the system will invoke a standard error message with the text of "Date entered must be equal to or less than today's date".

8.10.1.3 To Date Masked Edit Box (To)

This control will allow the user to specify the end date of the date range on which to filter the Generate Special Formula Rx Expiration Date Report. The masked edit box will be enabled when the dialog is active. The mask on the box will be "##/##/####" to accept a date with a four digit year. The masked edit box will initially be blank.

The string entered must represent a valid date in the format of MM/DD/CCYY. If an invalid date is entered, the system will invoke a standard error message with the text of "Invalid date entered."

The date entered must be equal to or greater than the current system date or the system will invoke a standard error message with the text of "Date entered must be equal to or greater than today's date."

8.10.1.4 Report Destination Radio Button

This control allows the user to select either Display on Screen, Send to Printer or Save as PDF. The control will be enabled when the dialog is enabled. It will default to Display on Screen.

8.10.1.5 OK Button

This control will allow the user to instruct the system to edit the values of the controls on the form, generate the report, and exit the dialog. The OK button will be enabled when the dialog is active. (See *Saving the Data* in the Processing section below). Characteristics for the OK button are defined in *Consistencies*.

8.10.1.6 Cancel Button

This control will allow the user to exit the dialog without generating a report. The Cancel button will be enabled when the dialog is active. Characteristics for the Cancel button are defined in *Consistencies*.

8.10.2 Processes

8.10.2.1 Initializing the Interface

Upon initial presentation of the dialog:

- The title bar text will be set to "Generate Special Formula RX Expiration Date Report"
- All Clinics will be displayed in the Clinic(s) list box in numeric order by Clinic ID and no clinic is initially selected
- The Date Range From masked edit box will be initially blank.
- The Date Range To masked edit box will be initially blank.
- The Report Destination will default to Display on Screen radio button.

8.10.2.2 Edits

Upon selection of the OK button:

- If at least one selection is not made in the Clinic(s) list box, the system will invoke a standard error message with the text "A selection is required in the {name of control}."
- If an entry is not made in the Date Range From masked edit box, the system will invoke a standard error message with the text "An entry is required for the {name of control}."
- The date entered in the Date Range From masked edit box must be equal to or greater than the current system date or the system will invoke a standard error message with the text "Date entered must be equal to or greater than today's date."
- The date entered in the Date Range From masked edit box must represent a valid date in the format of MM/DD/CCYY. If an invalid date is entered, the system will invoke a standard error message with the text "Invalid date entered."
- If an entry is not made in the Date Range To masked edit box, the system will invoke a standard error message with the text "An entry is required for the {name of control}."
- The date entered in the Date Range To masked edit box must be equal to or greater than the current system date or the system will invoke a standard error message with the text "Date entered must be equal to or greater than today's date."
- The date entered in the Date Range To masked edit box must represent a valid date in the format of MM/DD/CCYY. If an invalid date is entered, the system will invoke a standard error message with the text "Invalid date entered."
- The Date Range From masked edit box value must be equal to or less than the value of the Date Range To masked edit box. If the Date Range From masked edit box value is not equal to or less than the Date Range To masked edit box value, the system will invoke a standard error message with the text "Beginning of date range must be equal to or less than end of date range."

8.10.2.3 Generate Special Formula RX Expiration Date Report

Upon successful completion of the edits listed above, the system will generate the Special Formula RX Expiration Date to the selected report destination:

- If Report Destination is Screen, the system will display the report on the screen.
- If Report Destination is Printer, the system will generate the report and send it to the selected other output printer (see *System Tools*).
- If Report Destination is PDF, the system will invoke the "Save As" dialog. The user can select the folder and enter the file name, or cancel. Upon entering a file name and selecting Save, the system will save the file to the selected folder.

8.11 Special Formula Prescription Expiration Date Report (Output)) OPR025

This report allows the user to print a report that lists the special formula prescriptions that are expiring within a specified time range. The report is generated from the Generate Special Formula Prescription Expiration Date Report dialog.

Special Formula Prescription Expiration Date Report

```
OPR025
 SYSTEM NAME        SPECIAL FORMULA PRESCRIPTION EXPIRATION DATE REPORT       2/17/2002
 DON USER                      PRESCRIPTIONS ENDING FOR THE DATE RANGE          12:30:00
                               OF 02/17/2002  TO 03/31/2002                   PAGE   1

 CLINIC: 02 - DAVIESS COUNTY WIC PROGRAM

 PRESCRIPTION                                    STATE     NAME AND TYPE OF
 END DATE      PARTICIPANT NAME                  WIC ID    FORMULA
 ------------  ----------------------------      --------  ----------------------------------
 02/19/2002    JONES, BARBARA                    12223987  14.0-OZ CAN(S) ALSOY POWDERED
 02/19/2002    LUERDING, JEFF                    11658443  13-OZ CAN(S) CONCENTRATE ISOMIL
 03/07/2002    BROWN, JOHN                       11248764  32-OZ CAN(S) ISOMIL READY-TO-USE
 03/19/2002    HELMS, MARGARET                   11256664  14.0-OZ CAN(S) ALSOY POWDERED
```

8.11.1 Data Elements

This section describes the data elements that will print on the document.

8.11.1.1 Report Title

The title of the report will be the text "Special Formula Prescription Expiration Date Report" and the subtitle of the report will be the text "Prescriptions Ending for the Date Range" with the report date range specified by the user.

8.11.1.1.1 Origin of Data Element

The report date range will be selected by the user on the Generate Special Formula Rx Expiration Date Report dialog as described in this chapter.

8.11.1.1.2 Format

The date values will print in MM/DD/CCYY format.

8.11.1.2 Clinic Number and Name

This value will be the number and name of the Clinic where the participant receives service.

8.11.1.2.1 Origin of Data Element

The value will be populated from the appropriate values in the reference dictionary table of the lookup database for the Service-Site-Identifier of the HOUSEHOLD-MEMBER entity.

8.11.1.2.2 Format

The values will print as their literal value.

8.11.1.3 Prescription End Date

This value will be the date that the special formula prescription expires for the participant.

8.11.1.3.1 Origin of Data Element

The value will be taken from the Special-Prescription-End-Date attribute of the FOOD-PRESCRIPTION-ITEM entity of the participant.

8.11.1.3.2 Format

The value will print in MM/DD/CCYY format.

8.11.1.4 Participant Name

This value will be the full name of the participant with a special formula prescription that expires within the specified date range.

8.11.1.4.1 Origin of Data Element

The value will be taken from the Household-Member-Last-Name, Household-Member-First-Name and Household-Member-Middle-Initial attributes of the HOUSEHOLD-MEMBER entity for the client.

8.11.1.4.2 Format

The value will print in {last name}, {first name} {middle initial} format.

8.11.1.5 State WIC ID

This value will be the State WIC ID of the participant.

8.11.1.5.1 Origin of Data Element

The value will be taken from the Household-Member-State-WIC-Identifier attribute of the HOUSEHOLD-MEMBER entity of the client.

8.11.1.5.2 Format

The value will print as its literal value.

8.11.1.6 Name and Type of Formula

This value will be the name and type of formula on the special formula prescription.

8.11.1.6.1 Origin of Data Element

The value will be populated from the appropriate values in the reference dictionary table of the lookup database for the Food-Item-Code of the FOOD-PRESCRIPTION-ITEM entity.

8.11.1.6.2 Format

The value will print as its literal value.

8.11.2 Filter Criteria

8.11.2.1 Participants Enrolled at Specified Clinics

All participants enrolled at the user-specified Clinics will be included in the report.

8.11.2.2 Special Formula Prescription Expires

Only participants with a special formula prescription that expires within the specified date range will be included in the report. The Special-Prescription-End-Date attribute of the FOOD-PRESCRIPTION-ITEM entity will be checked.

8.11.3 Sort Order

8.11.3.1 Clinic

The report will be sorted first by Clinic.

8.11.3.2 Prescription End Date

The report will be sorted by the special formula prescription end date within the Clinic.

8.11.3.3 Participant Name

The report will be sorted by participant name within the special formula prescription end date.

8.11.4 Control Break

8.11.4.1 Clinic

A page break will occur on a change of Clinic.

8.11.5 Grand Total

No totals are defined for this report.

8.12 Generate Number of Participants Issued Food Instruments Dialog

The Generate Number of Participants Issued Food Instruments Report dialog allows the user to generate a report of the number of participants that were issued food instruments in the time period. It is invoked when the user selects the Number of Participants Issued Food Instruments list item from the Generate Reports dialog.
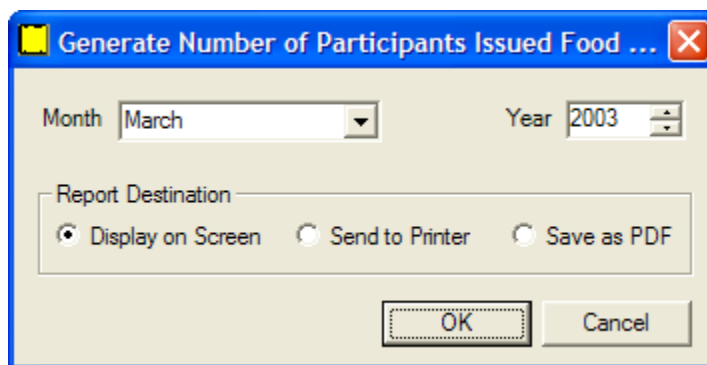
Figure 7 – Generate Number of Participants Issued Food Instruments Report Dialog

8.12.1 Controls

This section describes the behavior of the controls on the Generate Number of Participants Issued Food Instruments Report dialog.

8.12.1.1 Month Dropdown

This control allows the user to select the month to include in the report. The dropdown will be enabled when the Generate Number of Participants Issued Food Instruments Report dialog is active. This will be a read only drop down list. It is filled with a list of months from the Reference Dictionary Table, which is displayed in calendar month order within the list. It will default to the current month as defined by the Current_Month_End_Date attribute in the Process_Control table.

A selection is required.

8.12.1.2 Year Masked Edit Box and Spin Control

This control allows the user to specify the Calendar Year to include in the report. The masked edit box and spin control will be enabled when the Generate Number of Participants Issued Food Instruments Report dialog is active. The masked edit box will only allow the entry of numeric digits. The maximum size of the control will be four (4) characters. The masked edit box will default to the current system year. Selection of the increment or decrement buttons of the spin control will increase or decrease the value by one (1).

An entry is required. The year selected must be less than or equal to the current system year.

8.12.1.3 Report Destination Radio Button

This control allows the user to select either Display on Screen, Send to Printer or Save as PDF. The control will be enabled when the dialog is enabled. It will default to Display on Screen.

8.12.1.4 OK Button

This control allows the user to instruct the system to edit the values of the controls, generate the report, and exit the Generate Number of Participants Issued Food Instruments Report dialog. The OK button will be enabled when the Generate Number of Participants Issued Food Instruments Report dialog is active. (See *Saving the Data* in the Processing section below). Characteristics for the OK button are defined in *Consistencies*.

8.12.1.5 Cancel Button

This control allows the user to exit the Generate Number of Participants Issued Food Instruments Report dialog without generating a report. The Cancel button will be enabled when the Generate Number of Participants Issued Food Instruments Report dialog is active. Characteristics for the Cancel button are defined in *Consistencies*.

8.12.2 Processes

This section describes the processes (navigation) that take place as a result of the actions taken on the Generate Number of Participants Issued Food Instruments Report dialog.

8.12.2.1 Initializing the Interface

Upon initial presentation of the dialog:

- The title bar text will be set to "Generate Number of Participants Issued Food Instruments Report"
- The Month dropdown will default to the current month as defined by the Current_Month_End_Date attribute in the Process_Control table.
- The Year masked edit box will default to the current system year.
- The Report Destination will default to Display on Screen radio button.

8.12.2.2 Edits

Upon selection of the OK button:

- If a selection is not made in the Month Dropdown, the system will invoke a standard error message with the text "A selection is required in the <name of control>."
- If an entry is not made in the Year masked edit box, the system will invoke a standard error message with the text "An entry is required for the <name of control>."

- Month and Year combined values are validated:
  - The value entered in the Year masked edit box must be between 1900 and the current system year or the system will invoke a standard error message with the text "The Year must be between 1900 and the current system year."
  - If the year entered is within the current system year and the month selected is greater than the current system month, the system will invoke a standard error message with the text, "Month and year entered must be less than or equal to current month and year."

8.12.2.3 Generate Number of Participants Issued Food Instruments Report

Upon successful completion of the edits listed above, the system will generate the Number of Participants Issued Food Instruments Report to the selected report destination:

- If Report Destination is Screen, the system will display the report on the screen.
- If Report Destination is Printer, the system will generate the report and send it to the selected other output printer (see *System Tools*).
- If Report Destination is PDF, the system will invoke the "Save As" dialog. The user can select the folder and enter the file name, or cancel. Upon entering a file name and selecting Save, the system will save the file to the selected folder.

8.12.2.4 Cancel

Upon selection of the Cancel button, the system will dismiss the Generate Number of Participants Issued Food Instruments Report dialog and return the user to the Generate Reports dialog.

8.13 Number of Participants Issued Food Instruments (Output) OPR026

The Number of Participants Issued Food Instruments report is a month-by-month count of people who have been given a food instrument with a first date to use in that reported month. Depending on the front-end system, the first date to use may be the same as the participation date. Participants are counted in every month that he or she was issued a Food Instrument. An example is if a participant has received a Food Instrument that has a first date to use during the month of October, he or she is included in the count for October. The count for months does not take into account terminations or participants that become categorically ineligible.

This report will contain 18 months worth of food instrument information. The report will include the selected month and the seventeen prior months.

The issue month will be indicated with ISSD under the month name. The 30-day status month will be indicated with 30DY under the month name. When closeout for a month has been reached, C/O will print under the month name. The report is cumulative to allow the count of participants to be followed monthly from the issue month until closeout. Once a month has reached closeout, the counts will not change for that month.

If the category or priority for a participant changes during a reported month, the category and priority assigned on the last Food Instrument issued to the participant for that month will be used.

Within each category, totals are accumulated for applicable priorities. If a participant has an unknown priority or a priority that is not valid for their category, the participant is included in the 'Unknown' priority count.

Number of Participants Issued Food Instruments

```
OPR026
                          STATE DEPARTMENT OF HEALTH                      RUN DATE MM/DD/CCYY
                     NUMBER OF PARTICIPANTS ISSUED FOOD INSTRUMENTS       RUN TIME HH:MM:SS
                               MONTH OF X_X_X_X_X_X_X_X                   PAGE:    XXX
CLINIC  XX                 X_X_X_X_X_X_X_XCLINIC_DESCRIPTIONX_X_X_X_X_X_X_X_X

PARTICIPATION       OCT 99    DEC 99    FEB 00    APR 00    JUN 00    AUG 00    OCT 00    DEC 00    FEB 01
                    C/O       C/O       C/O       C/O       C/O       C/O       C/O       C/O       30 DY
                      NOV 99    JAN 00    MAR 00    MAY 00    JUL 00    SEP 00    NOV 00    JUN 01    MAR 01       C/O
                      C/O       C/O       C/O       C/O       C/O       C/O       C/O       C/O       ISSD        AVG
_____


MONTHLY
TOTAL PARTICIPATION  2,042    2,062     2,014     2,008     2,025     2,039     2,062     2,062     2,062
                        2,062    2,062     2,062     2,062     2,062     2,062     2,062     2,062     2,062         2,062

   WOMEN TOTAL         499      507       489       496       505       499       507       489       496
           PERCENT     24.4     24.6      21.4      24.7      24.9      24.4      24.6      21.4      24.7
                        499      507       489       496       505       499       507       489       496          496
                        24.4     24.6      21.4      24.7      24.9      24.4      24.6      21.4      24.7         24.1
    PRIORITY 1         499      507       489       496       505       499       507       489       496
           PERCENT     24.4     24.6      21.4      24.7      24.9      24.4      24.6      21.4      24.7
                        499      507       489       496       505       499       507       489       496          496
                        24.4     24.6      21.4      24.7      24.9      24.4      24.6      21.4      24.7         24.1
    PRIORITY 2         499      507       489       496       505       499       507       489       496
           PERCENT     24.4     24.6      21.4      24.7      24.9      24.4      24.6      21.4      24.7
                        499      507       489       496       505       499       507       489       496          496
                        24.4     24.6      21.4      24.7      24.9      24.4      24.6      21.4      24.7         24.1
    UNKNOWN            499      507       489       496       505       499       507       489       496
           PERCENT     24.4     24.6      21.4      24.7      24.9      24.4      24.6      21.4      24.7
                        499      507       489       496       505       499       507       489       496          496
                        24.4     24.6      21.4      24.7      24.9      24.4      24.6      21.4      24.7         24.1
   WOMEN -P - TOTAL    499      507       489       496       505       499       507       489       496
           PERCENT     24.4     24.6      21.4      24.7      24.9      24.4      24.6      21.4      24.7
                        499      507       489       496       505       499       507       489       496          496
                        24.4     24.6      21.4      24.7      24.9      24.4      24.6      21.4      24.7         24.1
    PRIORITY 1         499      507       489       496       505       499       507       489       496
           PERCENT     24.4     24.6      21.4      24.7      24.9      24.4      24.6      21.4      24.7
                        499      507       489       496       505       499       507       489       496          496
                        24.4     24.6      21.4      24.7      24.9      24.4      24.6      21.4      24.7         24.1
    UNKNOWN            499      507       489       496       505       499       507       489       496
           PERCENT     24.4     24.6      21.4      24.7      24.9      24.4      24.6      21.4      24.7
                        499      507       489       496       505       499       507       489       496          496
                        24.4     24.6      21.4      24.7      24.9      24.4      24.6      21.4      24.7         24.1
```

Number of Participants Issued Food Instruments

```
OPR026
                              STATE DEPARTMENT OF HEALTH                         RUN DATE MM/DD/CCYY
                        NUMBER OF PARTICIPANTS ISSUED FOOD INSTRUMENTS           RUN TIME HH:MM:SS
                              MONTH OF X X X X X X X X                           PAGE:    XXX
CLINIC  XX                  X_X_X_X_X_X_X_XCLINIC_DESCRIPTIONX_X_X_X_X_X_X_X

PARTICIPATION         OCT 99    DEC 99    FEB 00    APR 00    JUN 00    AUG 00    OCT 00    DEC 00    FEB 01
                      C/O       C/O       C/O       C/O       C/O       C/O       C/O       C/O       30 DY
                        NOV 99    JAN 00    MAR 00    MAY 00    JUL 00    SEP 00    NOV 00    JUN 01    MAR 01          C/O
                        C/O       C/O       C/O       C/O       C/O       C/O       C/O       C/O       ISSD          AVG
  _____


   WOMEN -B-  TOTAL           499       507       489       496       505       499       507       489       496
              PERCENT    24.4      24.6      21.4      24.7      24.9      24.4      24.6      21.4      24.7
                           499       507       489       496       505       499       507       489       496           496
                         24.4      24.6      21.4      24.7      24.9      24.4      24.6      21.4      24.7          24.1
     PRIORITY 1           499       507       489       496       505       499       507       489       496
              PERCENT    24.4      24.6      21.4      24.7      24.9      24.4      24.6      21.4      24.7
                           499       507       489       496       505       499       507       489       496           496
                         24.4      24.6      21.4      24.7      24.9      24.4      24.6      21.4      24.7          24.1
     PRIORITY 2           499       507       489       496       505       499       507       489       496
              PERCENT    24.4      24.6      21.4      24.7      24.9      24.4      24.6      21.4      24.7
                           499       507       489       496       505       499       507       489       496           496
                         24.4      24.6      21.4      24.7      24.9      24.4      24.6      21.4      24.7          24.1
     UNKNOWN              499       507       489       496       505       499       507       489       496
              PERCENT    24.4      24.6      21.4      24.7      24.9      24.4      24.6      21.4      24.7
                           499       507       489       496       505       499       507       489       496           496
                         24.4      24.6      21.4      24.7      24.9      24.4      24.6      21.4      24.7          24.1
   WOMEN -N-  TOTAL       499       507       489       496       505       499       507       489       496
              PERCENT    24.4      24.6      21.4      24.7      24.9      24.4      24.6      21.4      24.7
                           499       507       489       496       505       499       507       489       496           496
                         24.4      24.6      21.4      24.7      24.9      24.4      24.6      21.4      24.7          24.1
     PRIORITY 1           499       507       489       496       505       499       507       489       496
              PERCENT    24.4      24.6      21.4      24.7      24.9      24.4      24.6      21.4      24.7
                           499       507       489       496       505       499       507       489       496           496
                         24.4      24.6      21.4      24.7      24.9      24.4      24.6      21.4      24.7          24.1
     UNKNOWN              499       507       489       496       505       499       507       489       496
              PERCENT    24.4      24.6      21.4      24.7      24.9      24.4      24.6      21.4      24.7
                           499       507       489       496       505       499       507       489       496           496
                         24.4      24.6      21.4      24.7      24.9      24.4      24.6      21.4      24.7          24.1

        1         2         3         4         5         6         7         8         9         0         1         2
1234567890123456789012345678901234567890123456789012345678901234567890123456789012345678901234567890123456789012345678901234567890
```

Number of Participants Issued Food Instruments

```
OPR026
                              STATE DEPARTMENT OF HEALTH                              RUN DATE MM/DD/CCYY
                        NUMBER OF PARTICIPANTS ISSUED FOOD INSTRUMENTS                RUN TIME HH:MM:SS
                              MONTH OF X_X_X_X_X_X_X_X                                PAGE:    XXX
CLINIC  XX              X_X_X_X_X_X_X_XCLINIC_DESCRIPTIONX_X_X_X_X_X_X_X

PARTICIPATION          OCT 99    DEC 99    FEB 00    APR 00    JUN 00    AUG 00    OCT 00    DEC 00    FEB 01
                       C/O       C/O       C/O       C/O       C/O       C/O       C/O       C/O       30 DY
                         NOV 99    JAN 00    MAR 00    MAY 00    JUL 00    SEP 00    NOV 00    JUN 01    MAR 01          C/O
                         C/O       C/O       C/O       C/O       C/O       C/O       C/O       C/O       ISSD          AVG
      _____

  INFANT TOTAL          499       507       489       496       505       499       507       489       496
          PERCENT       24.4      24.6      21.4      24.7      24.9      24.4      24.6      21.4      24.7
                          499       507       489       496       505       499       507       489       496            496
                          24.4      24.6      21.4      24.7      24.9      24.4      24.6      21.4      24.7           24.1
    PRIORITY 1          499       507       489       496       505       499       507       489       496
          PERCENT       24.4      24.6      21.4      24.7      24.9      24.4      24.6      21.4      24.7
                          499       507       489       496       505       499       507       489       496            496
                          24.4      24.6      21.4      24.7      24.9      24.4      24.6      21.4      24.7           24.1
    PRIORITY 2          499       507       489       496       505       499       507       489       496
          PERCENT       24.4      24.6      21.4      24.7      24.9      24.4      24.6      21.4      24.7
                          499       507       489       496       505       499       507       489       496            496
                          24.4      24.6      21.4      24.7      24.9      24.4      24.6      21.4      24.7           24.1
    UNKNOWN             499       507       489       496       505       499       507       489       496
          PERCENT       24.4      24.6      21.4      24.7      24.9      24.4      24.6      21.4      24.7
                          499       507       489       496       505       499       507       489       496            496
                          24.4      24.6      21.4      24.7      24.9      24.4      24.6      21.4      24.7           24.1
  INFANT -I- TOTAL      499       507       489       496       505       499       507       489       496
          PERCENT       24.4      24.6      21.4      24.7      24.9      24.4      24.6      21.4      24.7
                          499       507       489       496       505       499       507       489       496            496
                          24.4      24.6      21.4      24.7      24.9      24.4      24.6      21.4      24.7           24.1
    PRIORITY 1          499       507       489       496       505       499       507       489       496
          PERCENT       24.4      24.6      21.4      24.7      24.9      24.4      24.6      21.4      24.7
                          499       507       489       496       505       499       507       489       496            496
                          24.4      24.6      21.4      24.7      24.9      24.4      24.6      21.4      24.7           24.1
    UNKNOWN             499       507       489       496       505       499       507       489       496
          PERCENT       24.4      24.6      21.4      24.7      24.9      24.4      24.6      21.4      24.7
                          499       507       489       496       505       499       507       489       496            496
                          24.4      24.6      21.4      24.7      24.9      24.4      24.6      21.4      24.7           24.1

         1         2         3         4         5         6         7         8         9         0         1         2
12345678901234567890123456789012345678901234567890123456789012345678901234567890123456789012345678901234567890123456789012
```

Number of Participants Issued Food Instruments

```
OPR026
                              STATE DEPARTMENT OF HEALTH                        RUN DATE MM/DD/CCYY
                        NUMBER OF PARTICIPANTS ISSUED FOOD INSTRUMENTS          RUN TIME HH:MM:SS
                                MONTH OF X_X_X_X_X_X_X_X                        PAGE:    XXX
CLINIC  XX                      X_X_X_X_X_X_X_XCLINIC_DESCRIPTIONX_X_X_X_X_X_X_X_X

PARTICIPATION           OCT 99   DEC 99   FEB 00    APR 00    JUN 00    AUG 00    OCT 00    DEC 00    FEB 01
                        C/O      C/O      C/O       C/O       C/O       C/O       C/O       C/O       30 DY
                          NOV 99   JAN 00    MAR 00    MAY 00    JUL 00    SEP 00    NOV 00    JUN 01    MAR 01        C/O
                          C/O      C/O       C/O       C/O       C/O       C/O       C/O       C/O       ISSD         AVG
              _____


   UNKNOWN         499      507      489       496       505       499       507       489       496
              PERCENT   24.4     24.6     21.4      24.7      24.9      24.4      24.6      21.4      24.7
                          499      507      489       496       505       499       507       489       496           496
                          24.4     24.6     21.4      24.7      24.9      24.4      24.6      21.4      24.7          24.1
   CHILDREN   TOTAL     499      507      489       496       505       499       507       489       496
              PERCENT   24.4     24.6     21.4      24.7      24.9      24.4      24.6      21.4      24.7
                          499      507      489       496       505       499       507       489       496           496
                          24.4     24.6     21.4      24.7      24.9      24.4      24.6      21.4      24.7          24.1
   PRIORITY 1          499      507      489       496       505       499       507       489       496
              PERCENT   24.4     24.6     21.4      24.7      24.9      24.4      24.6      21.4      24.7
                          499      507      489       496       505       499       507       489       496           496
                          24.4     24.6     21.4      24.7      24.9      24.4      24.6      21.4      24.7          24.1
   UNKNOWN             499      507      489       496       505       499       507       489       496
              PERCENT   24.4     24.6     21.4      24.7      24.9      24.4      24.6      21.4      24.7
                          499      507      489       496       505       499       507       489       496           496
                          24.4     24.6     21.4      24.7      24.9      24.4      24.6      21.4      24.7          24.1


     1         2         3         4         5         6         7         8         9         0         1         2
123456789012345678901234567890123456789012345678901234567890123456789012345678901234567890123456789012345678901234567890123456789012
```

8.13.1 Data Elements

The reported participation totals are a monthly-unduplicated count of participants who were issued at least one food instrument. A value of 'Y' in the Rpted_This_Month attribute of the Caseload_Count table indicates that the participant has received a food instrument for the reported month.

8.13.1.1 Total (Monthly Count)

8.13.1.1.1 Origin of Data Element

This attribute is calculated by counting the number of people who received a Food Instrument with a first date to use in the reported month. It is the summation of all WIC Category totals (pregnant, breastfeeding, non-breastfeeding, infants and children).

8.13.1.1.2 Format

This value is a six-digit number.

8.13.1.2 Category Total (Monthly Count)

8.13.1.2.1 Origin of Data Element

This attribute is calculated by counting the number of people by WIC Category that received a Food Instrument with a first date to use in the month. The person will be counted in the latest WIC Category they were served in during the reported month.

The total for all women is a summation of all women category (pregnant, breastfeeding, and non-breastfeeding).

8.13.1.2.2 Format

This value is a six-digit number.

8.13.1.3 Priority Total (Monthly Count)

8.13.1.3.1 Origin of Data Element

This attribute is calculated by counting the number of people by WIC Category priority that received a Food Instrument with a first date to use in the reported month. The person will be counted in the latest WIC Category priority they were served in during the reported month.

The total for all women is a summation of all women category by priority (pregnant, breastfeeding, and non-breastfeeding).

8.13.1.3.2 Format

This value is a six-digit number.

8.13.1.4 Percent

8.13.1.4.1 Origin of Data Element

This attribute is calculated by dividing the line total for the month by the reported participation for the same month. For the percent of the WIC Category, this is the percent of this WIC Category to the total of all WIC categories. For the percent of the WIC Category priorities, this is the percent of the priority within this WIC Category.

8.13.1.4.2 Format

This value is a three-digit number plus one decimal place.

8.13.1.5 C/O Avg

8.13.1.5.1 Origin of Data Element

This attribute is calculated by totaling the values in the row for closeout months and dividing the accumulated total by the number of closeout months included.

8.13.1.5.2 Format

This value is a six-digit number.

8.13.2 Filter Criteria

All participants that receive a food instrument with a first date to use in the month are included in the counts for the reported months. Each participant is counted in the totals for one category and priority. The selected month and prior 17 months are reported.

8.13.2.1 Sort Order

8.13.2.1.1 Clinic Identifier

The report will be sorted by Clinic identifier.

8.13.2.2 Control Breaks

8.13.2.2.1 Clinic Identifier

On a change of clinic identifier a page break will occur.

8.13.2.3 Grand Total

The totals for all clinics will be printed as state totals.

8.13.2.4 Frequency and Distribution

Frequency - On demand

Data current as of - Previous month-end

8.13.2.4.1 Report Listing

The data for the months of the listing will depend on the amount of food instrument information that the State elects to save.

8.14 Actual Enrollment Versus Caseload Assigned Dialog

The Generate Actual Enrollment Versus Caseload Assigned Report dialog allows the user to generate a report of the number of participants that were actually enrolled in WIC compared with the caseload assigned to the clinic in the county, municipality, and time period. It is invoked when the user selects the Actual Enrollment Versus Caseload Assigned list item from the Generate Reports dialog.
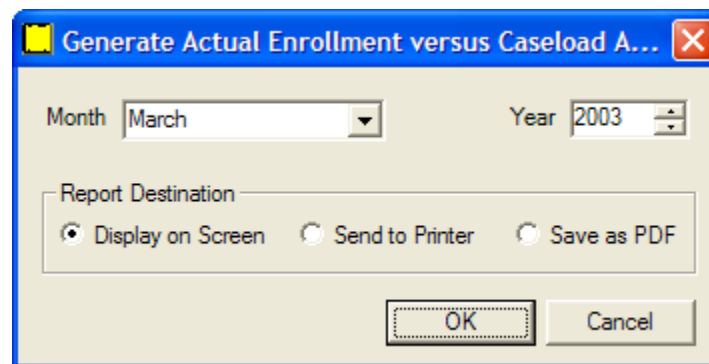
Figure 8 – Generate Actual Enrollment versus Caseload Assigned Report Dialog

8.14.1 Controls

This section describes the behavior of the controls on the Generate Actual Enrollment Versus Caseload Assigned Report dialog.

8.14.1.1 Month Dropdown

This control allows the user to select the month to include in the report. The dropdown will be enabled when the Generate Actual Enrollment Versus Caseload Assigned Report dialog is active. This will be a read only drop down list. It is filled with a list of months from the Reference Dictionary Table, which is displayed in calendar month order within the list. It will default to the current month as defined by the Current_Month_End_Date attribute in the Process_Control table.

A selection is required.

8.14.1.2 Year Masked Edit Box and Spin Control

This control allows the user to specify the Calendar Year to include in the report. The masked edit box and spin control will be enabled when the Generate Actual Enrollment Versus Caseload Assigned Report dialog is active. The masked edit box will only allow the entry of numeric digits. The maximum size of the control will be four (4) characters. The masked edit box will default to the current system year. Selection of the increment or decrement buttons of the spin control will increase or decrease the value by one (1).

An entry is required. The year selected must be less than or equal to the current system year.

8.14.1.3 Report Destination Radio Button

This control allows the user to select either Display on Screen, Send to Printer or Save as PDF. The control will be enabled when the dialog is enabled. It will default to Display on Screen.

8.14.1.4 OK Button

This control allows the user to instruct the system to edit the values of the controls, generate the report, and exit the Generate Actual Enrollment Versus Caseload Assigned Report dialog. The OK button will be enabled when the Generate Actual Enrollment Versus Caseload Assigned Report dialog is active. (See *Saving the Data* in the Processing section below). Characteristics for the OK button are defined in *Consistencies*.

8.14.1.5 Cancel Button

This control allows the user to exit the Generate Actual Enrollment Versus Caseload Assigned Report dialog without generating a report. The Cancel button will be enabled when the Generate Actual Enrollment Versus Caseload Assigned Report dialog is active. Characteristics for the Cancel button are defined in *Consistencies*.

8.14.2 Processes

This section describes the processes (navigation) that take place as a result of the actions taken on the Generate Actual Enrollment Versus Caseload Assigned Report dialog.

8.14.2.1 Initializing the Interface

Upon initial presentation of the dialog:

- The title bar text will be set to "Generate Actual Enrollment Versus Caseload Assigned Report"
- The Month dropdown will default to the current month as defined by the Current_Month_End_Date attribute in the Process_Control table.
- The Year masked edit box will default to the current system year.
- The Report Destination will default to Display on Screen radio button.

8.14.2.2 Edits

Upon selection of the OK button:

- If a selection is not made in the Month Dropdown, the system will invoke a standard error message with the text "A selection is required in the <name of control>."
- If an entry is not made in the Year masked edit box, the system will invoke a standard error message with the text "An entry is required for the <name of control>."

- Month and Year combined values are validated:
    - The value entered in the Year masked edit box must be between 1900 and the current system year or the system will invoke a standard error message with the text "The Year must be between 1900 and the current system year."
    - If the year entered is within the current system year and the month selected is greater than the current system month, the system will invoke a standard error message with the text, "Month and year entered must be less than or equal to current month and year."

8.14.2.3 Generate Actual Enrollment Versus Caseload Assigned Report

Upon successful completion of the edits listed above, the system will generate the Actual Enrollment Versus Caseload Assigned Report to the selected report destination:

- If Report Destination is Screen, the system will display the report on the screen.
- If Report Destination is Printer, the system will generate the report and send it to the selected other output printer (see *System Tools*).
- If Report Destination is PDF, the system will invoke the "Save As" dialog. The user can select the folder and enter the file name, or cancel. Upon entering a file name and selecting Save, the system will save the file to the selected folder.

8.14.2.4 Cancel

Upon selection of the Cancel button, the system will dismiss the Generate Actual Enrollment Versus Caseload Assigned Report dialog without producing the report and return the user to the Generate Reports dialog.

8.15 Actual Enrollment Versus Caseload Assigned (Output) CLD028

The Actual Enrollment Versus Caseload Assigned report is a monthly count of enrollment for each county and municipality. The enrollment is a count of all participants eligible to receive benefits during the reported month. Each participant is counted once in each month that they are eligible to receive benefits.

The count of enrollment is broken down by WIC Category within clinic and is cross-referenced with municipality and county. The enrollee is counted in the county of residence most recently recorded during the month-end process.

Caseload is assigned as of that point in time. If a prior month's report is requested and the caseload assigned data has subsequently been updated, the updated caseload assigned data will be included in the requested report.

Actual Enrollment versus Caseload Assigned

```
CLD022
                         RHODE ISLAND STATE DEPARTMENT OF HEALTH                    RUN DATE XX/XX/XXXX
                       ACTUAL ENROLLMENT VERSUS CASELOAD ASSIGNED                   RUN TIME HH:MM:SS
                            MONTH ENDING X_X_X_X_X_X_X_X                            PAGE:    XXX

                             CASELOAD    ACTUAL      % OF CLINIC    % OF CASELOAD
CLINIC/COUNTY/MUNICIPALITY                 ASSIGNED   ENROLLED        ENROLLEES    ASSIGNED/ ACTUAL ENROLLED
_____

XXXXXXXXXXXXXXXXXXXXXXXXXXXXXX
   XXXXXXXXXXXXXXXXXXXXXXXXX
      XXXXXXXXXXXXXXXXXXXXXXXXX
              PREGNANT WOMEN             N/A       XXX,XXX       XXX.XX         XXX.XX
              BREASTFEEDING WOMEN        N/A       XXX,XXX       XXX.XX         XXX.XX
              NON-BREASTFEEDING WOMEN    N/A       XXX,XXX       XXX.XX         XXX.XX
              INFANTS                    N/A       XXX,XXX       XXX.XX         XXX.XX
              CHILDREN                   N/A       XXX,XXX       XXX.XX         XXX.XX

      MUNICIPALITY TOTALS               N/A       XXX,XXX       XXX.XX         XXX.XX

      XXXXXXXXXXXXXXXXXXXXXXXXX
              PREGNANT WOMEN             N/A       XXX,XXX       XXX.XX         XXX.XX
              BREASTFEEDING WOMEN        N/A       XXX,XXX       XXX.XX         XXX.XX
              NON-BREASTFEEDING WOMEN    N/A       XXX,XXX       XXX.XX         XXX.XX
              INFANTS                    N/A       XXX,XXX       XXX.XX         XXX.XX
              CHILDREN                   N/A       XXX,XXX       XXX.XX         XXX.XX

      MUNICIPALITY TOTALS               N/A       XXX,XXX       XXX.XX         XXX.XX

      COUNTY TOTALS                     N/A       XXX,XXX       XXX.XX         XXX.XX

   CLINIC TOTALS                    XXX,XXX       XXX,XXX       XXX.XX         XXX.XX

1         2         3         4         5         6         7         8         9         0         1         2
123456789012345678901234567890123456789012345678901234567890123456789012345678901234567890123456789012345678901234567890123456789012
```

Actual Enrollment Versus Caseload Assigned

```
CLD028
                        RHODE ISLAND STATE DEPARTMENT OF HEALTH                    RUN DATE XX/XX/XXXX
                        ACTUAL ENROLLMENT VERSUS CASELOAD ASSIGNED                 RUN TIME HH:MM:SS
                             MONTH ENDING X_X_X_X_X_X_X_X                          PAGE:    XXX


                               CASELOAD      ACTUAL        % OF STATE    % OF CASELOAD
STATE                          ASSIGNED      ENROLLED       ENROLLEES    ASSIGNED/ ACTUAL ENROLLED
_____


              PREGNANT WOMEN          N/A      XXX,XXX        XXX.XX        XXX.XX
              BREASTFEEDING WOMEN     N/A      XXX,XXX        XXX.XX        XXX.XX
              NON-BREASTFEEDING WOMEN N/A      XXX,XXX        XXX.XX        XXX.XX
              INFANTS                 N/A      XXX,XXX        XXX.XX        XXX.XX
              CHILDREN                N/A      XXX,XXX        XXX.XX        XXX.XX

STATE TOTALS                        XXX,XXX    XXX,XXX        XXX.XX        XXX.XX



1         2         3         4         5         6         7         8         9         0         1         2
1234567890123456789012345678901234567890123456789012345678901234567890123456789012345678901234567890123456789012
```

8.15.1 Data Elements

8.15.1.1 Caseload Assigned (Clinic)

This value is a count of the caseload assigned for state agencies. The state office provides this value. A value should be provided for every clinic. If a value is not provided for a clinic, 'n/a' is used in its place. The state totals are an accumulation of the clinic totals. If a value is not assigned for the county/municipality, 'n/a' is used in its place.

8.15.1.1.1 Origin of Data Element

For clinics, this value will come from the Total_Assigned_Caseload attribute of the Assigned_Caseload table.

8.15.1.1.2 Format

This value is an eight-digit number.

8.15.1.2 Caseload Assigned per WIC Category

This value is a count of the caseload assigned for clinics. The state office provides this value. A value should be provided for every clinic. If a value is not provided for a clinic, 'n/a' is used in its place. The state totals are an accumulation of the clinic totals. If a value is not assigned for the county/municipality, 'n/a' is used in its place.

8.15.1.2.1 Origin of Data Element

For the state totals, this value is the summary of the WIC Category from the Assigned_Caseload attribute of the Status_Assigned_Caseload table.

8.15.1.2.2 Format

This value is an eight-digit number.

8.15.1.3 Actual Enrolled

The following is a description of the active enrolled counts for each category within the clinic for the reported month. The municipality totals are an accumulation of the category totals. The county totals are an accumulation of the municipality totals. The clinic totals are an accumulation of the county totals. The state totals are an accumulation of the clinic totals.

8.15.1.3.1 Origin of Data Element

This attribute is calculated by totaling the number of participants eligible to receive WIC benefits during the reported month. A value of 'Y' in the Enrolled_This_Month attribute of the Caseload_Count_Enrollment table indicates that the participant was eligible to receive WIC benefits during the reported month. Participants are grouped by Clinic, WIC_Status, County and Legal_Municipality attributes of the Caseload_Count_Enrollment table.

8.15.1.3.2 Format

This value is a six-digit number.

8.15.1.4 % of Clinic/State Enrollees

8.15.1.4.1 Origin of Data Element

This attribute is calculated by dividing the actual enrolled amount for this line (WIC Category) by the active enrolled value for this clinic. This calculation is performed for every line item on the report.

8.15.1.4.2 Format

This value is a three-digit number plus one decimal place.

8.15.1.5 % of Caseload Assigned/ Actual Enrolled

8.15.1.5.1 Origin of Data Element

This attribute is calculated by dividing the Caseload Assigned amount for this line by the Caseload Assigned value for this clinic. This calculation is performed for every line item on the report where there is an assigned caseload amount. If an assigned caseload value is not provided, 'n/a' is used in its place.

8.15.1.5.2 Format

This value is a three-digit number plus one decimal place.

8.15.2 Filter Criteria

8.15.2.1 Active Enrollees

All participants eligible to receive WIC benefits during the reported month are selected for this report. A value of 'Y' in the Enrolled_This_Month attribute of the Caseload_Count_Enrollment table indicates that the participant was eligible to receive WIC benefits during the reported month.

8.15.3 Sort Order

8.15.3.1 Clinic

The report will be sorted by Clinic name within the State.

8.15.3.2 County

The report will be sorted by County name within Clinic name.

8.15.3.3 Municipality

The report will be sorted by Municipality name within County name.

8.15.3.4 WIC Category

The report will be sorted by WIC Category within municipality. The following sequence will be used.

- Pregnant Women
- Breastfeeding Women
- Non-Breastfeeding Women
- Infant
- Children

8.15.4 Control Breaks

8.15.4.1 Clinic

On a change of Clinic name a page break will occur.

8.15.5 Grand Total

A total for all Clinics will be printed as state totals.

8.15.6 Frequency and Distribution

Frequency   - On Demand

Data current as of   - Previous month-end

8.16 Reported Participation versus Caseload Assigned Dialog

The Generate Reported Participation Versus Caseload Assigned Report dialog allows the user to generate a report that compares the number of participants that received WIC benefits to the caseload assigned to for the clinic in the county, municipality, and time period. It is invoked when the user selects the Reported Participation Versus Caseload Assigned list item from the Generate Reports dialog.
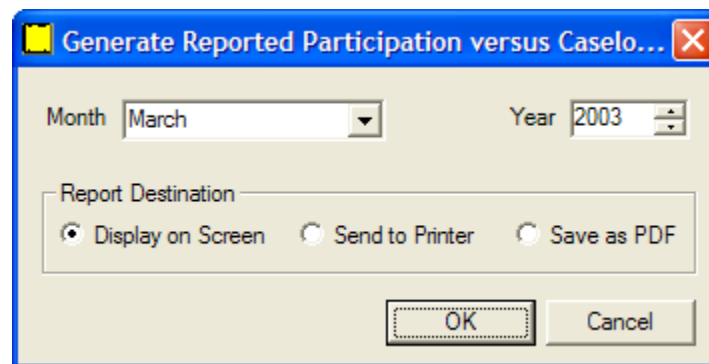
Figure 9 – Generate Reported Participation Versus Caseload Assigned Report Dialog

8.16.1 Controls

This section describes the behavior of the controls on the Generate Reported Participation Versus Caseload Assigned Report dialog.

8.16.1.1 Month Dropdown

This control allows the user to select the month to include in the report. The dropdown will be enabled when the Generate Reported Participation Versus Caseload Assigned Report dialog is active. This will be a read only drop down list. It is filled with a list of months from the Reference Dictionary Table, which is displayed in calendar month order within the list. It will default to the current month as defined by the Current_Month_End_Date attribute in the Process_Control table.

A selection is required.

8.16.1.2 Year Masked Edit Box and Spin Control

This control allows the user to specify the Calendar Year to include in the report. The masked edit box and spin control will be enabled when the Generate Reported Participation Versus Caseload Assigned Report dialog is active. The masked edit box will only allow the entry of numeric digits. The maximum size of the control will be four (4) characters. The masked edit box will default to the current system year. Selection of the increment or decrement buttons of the spin control will increase or decrease the value by one (1).

An entry is required. The year selected must be less than or equal to the current system year.

8.16.1.3 Report Destination Radio Button

This control allows the user to select either Display on Screen, Send to Printer or Save as PDF. The control will be enabled when the dialog is enabled. It will default to Display on Screen.

8.16.1.4 OK Button

This control allows the user to instruct the system to edit the values of the controls, generate the report, and exit the Generate Reported Participation Versus Caseload Assigned Report dialog. The OK button will be enabled when the Generate Reported Participation Versus Caseload Assigned Report dialog is active. (See *Saving the Data* in the Processing section below). Characteristics for the OK button are defined in *Consistencies*.

8.16.1.5 Cancel Button

This control allows the user to exit the Generate Reported Participation Versus Caseload Assigned Report dialog without generating a report. The Cancel button will be enabled when the Generate Reported Participation Versus Caseload Assigned Report dialog is active. Characteristics for the Cancel button are defined in *Consistencies*.

8.16.2 Processes

This section describes the processes (navigation) that take place as a result of the actions taken on the Generate Reported Participation Versus Caseload Assigned Report dialog.

8.16.2.1 Initializing the Interface

Upon initial presentation of the dialog:

- The title bar text will be set to "Generate Reported Participation Versus Caseload Assigned Report"
- The Month dropdown will default to the current month as defined by the Current_Month_End_Date attribute in the Process_Control table.
- The Year masked edit box will default to the current system year.
- The Report Destination will default to Display on Screen radio button.

8.16.2.2 Edits

Upon selection of the OK button:

- If a selection is not made in the Month Dropdown, the system will invoke a standard error message with the text "A selection is required in the <name of control>."
- If an entry is not made in the Year masked edit box, the system will invoke a standard error message with the text "An entry is required for the <name of control>."

- Month and Year combined values are validated:
  - The value entered in the Year masked edit box must be between 1900 and the current system year or the system will invoke a standard error message with the text "The Year must be between 1900 and the current system year."
  - If the year entered is within the current system year and the month selected is greater than the current system month, the system will invoke a standard error message with the text, "Month and year entered must be less than or equal to current month and year."

8.16.2.3 Generate Reported Participation Versus Caseload Assigned Report

Upon successful completion of the edits listed above, the system will generate the Reported Participation Versus Caseload Assigned Report Assigned Report to the selected report destination:

- If Report Destination is Screen, the system will display the report on the screen.
- If Report Destination is Printer, the system will generate the report and send it to the selected other output printer (see *System Tools*).
- If Report Destination is PDF, the system will invoke the "Save As" dialog. The user can select the folder and enter the file name, or cancel. Upon entering a file name and selecting Save, the system will save the file to the selected folder.

8.16.2.4 Cancel

Upon selection of the Cancel button, the system will dismiss the Generate Reported Participation Versus Caseload Assigned Report dialog without producing the report and return the user to the Generate Reports dialog.

8.17 Reported Participation Versus Caseload Assigned (Output) CLD023

The Reported Participation Versus Caseload Assigned report is a monthly count of unduplicated monthly reported participation for each county and municipality. Reported participation is the count of participants that received WIC benefits. Each participant is count once in each month that they received benefits.

The count of unduplicated monthly reported participation is broken down by WIC Category within clinic and is cross-referenced with municipality and county. The enrollee is counted in the county of residence most recently recorded during the month-end process.

A 'Balance of Clinic' total of participants will be printed if the clinic issued food instruments for the reported month to a participant that was subsequently ineligible to receive WIC benefits.

Caseload is assigned as of that point in time. If a prior month's report is requested and the caseload assigned data has subsequently been updated, the updated caseload assigned data will be included in the requested report.

Reported Participation versus Caseload Assigned

```
CLD023
                              RHODE ISLAND STATE DEPARTMENT OF HEALTH                      RUN DATE XX/XX/XXXX
                            REPORTED PARTICIPATION VERSUS CASELOAD ASSIGNED                RUN TIME HH:MM:SS
                                   MONTH ENDING X_X_X_X_X_X_X_X                            PAGE:   XXX

                                CASELOAD      REPORTED        % OF CLINIC    % OF CASELOAD
CLINIC/COUNTY/MUNICIPALITY      ASSIGNED    PARTICIPATION    PARTICIPANTS    ASSIGNED / ACTUAL PARTICIPANTS


XXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXX
   XXXXXXXXXXXXXXXXXXXXXXXXX
      XXXXXXXXXXXXXXXXXXXXXXXXXXX
            PREGNANT WOMEN            N/A      XXX,XXX          XXX.XX          XXX.XX
            BREASTFEEDING WOMEN       N/A      XXX,XXX          XXX.XX          XXX.XX
            NON-BREASTFEEDING WOMEN   N/A      XXX,XXX          XXX.XX          XXX.XX
            INFANTS                   N/A      XXX,XXX          XXX.XX          XXX.XX
            CHILDREN                  N/A      XXX,XXX          XXX.XX          XXX.XX

      MUNICIPALITY TOTALS            N/A      XXX,XXX          XXX.XX          XXX.XX

      COUNTY TOTALS                  N/A      XXX,XXX          XXX.XX          XXX.XX

                BALANCE OF CLINIC    N/A      XXX,XXX          XXX.XX          XXX.XX

      CLINIC TOTALS              XXX,XXX      XXX,XXX          XXX.XX          XXX.XX

1         2         3         4         5         6         7         8         9         0         1         2
1234567890123456789012345678901234567890123456789012345678901234567890123456789012345678901234567890123456789012
```

Reported Participation Versus Caseload Assigned

```
CLD023
                          STATE DEPARTMENT OF HEALTH                    RUN DATE XX/XX/XXXX
               REPORTED PARTICIPATION VERSUS CASELOAD ASSIGNED         RUN TIME HH:MM:SS
                        MONTH ENDING X_X_X_X_X_X_X_X                    PAGE:   XXX


                        CASELOAD      REPORTED       % OF CLINIC   % OF CASELOAD
STATE                   ASSIGNED      PARTICIPATION  PARTICIPANTS  ASSIGNED/ ACTUAL PARTICIPANTS
_____

          PREGNANT WOMEN            N/A       XXX,XXX        XXX.XX        XXX.XX
          BREASTFEEDING WOMEN       N/A       XXX,XXX        XXX.XX        XXX.XX
          NON-BREASTFEEDING WOMEN   N/A       XXX,XXX        XXX.XX        XXX.XX
          INFANTS                   N/A       XXX,XXX        XXX.XX        XXX.XX
          CHILDREN                  N/A       XXX,XXX        XXX.XX        XXX.XX

STATE TOTALS                    XXX,XXX       XXX,XXX        XXX.XX        XXX.XX




1         2         3         4         5         6         7         8         9         0         1         2
123456789012345678901234567890123456789012345678901234567890123456789012345678901234567890123456789012345678901234567890012
```

8.17.1 Data Elements

8.17.1.1 Caseload Assigned (Clinic)

This value is a count of the caseload assigned for clinics. The state office provides this value. A value should be provided for every clinic. If a value is not provided for a clinic, 'n/a' is used in its place. The state totals are an accumulation of the clinic totals. If a value is not assigned for the county/municipality, 'n/a' is used in its place.

8.17.1.1.1 Origin of Data Element

For clinics, this value will come from the Total_Assigned_Caseload attribute of the Assigned_Caseload table.

8.17.1.1.2 Format

This value is an eight-digit number.

8.17.1.2 Caseload Assigned per WIC Category

This value is a count of the caseload assigned for clinics. The state office provides this value. A value should be provided for every clinic. If a value is not provided for a clinic, 'n/a' is used in its place. The state totals are an accumulation of the clinic totals. If a value is not assigned for the county/municipality, 'n/a' is used in its place.

8.17.1.2.1 Origin of Data Element

For the state totals, this value is the summary of the WIC Category from the Assigned_Caseload attribute of the Status_Assigned_Caseload table.

8.17.1.2.2 Format

This value is an eight-digit number.

8.17.1.3 Reported Participation

The following is a description of the reported participation counts for each category within the clinic for the reported month. The municipality totals are an accumulation of the category totals. The county totals are an accumulation of the municipality totals. The clinic totals are an accumulation of the county totals. The state totals are an accumulation of the clinic totals.

A 'Balance of Clinic' total will be printed if the clinic issued food instruments to a participant that was subsequently ineligible to receive WIC benefits.

8.17.1.3.1 Origin of Data Element

This attribute is calculated by totaling the number of participants that received WIC benefits during the reported month. A value of 'Y' in the Rpted_This_Month attribute of the Caseload_Count table indicates that the participant received WIC benefits during the reported month. Participants are grouped by Clinic and WIC_Status of the Caseload_Count table; then by County and Legal_Municipality of the Caseload_Count_Enrollment table. The total for 'Balance of Clinic' is a one-line total for the clinic.

8.17.1.3.2 Format

This value is a six-digit number.

8.17.1.4 % of Clinic Participants

8.17.1.4.1 Origin of Data Element

This attribute is calculated by dividing the reported participation amount for this line (WIC Category) by the reported participation value for this clinic. This calculation is performed for every line item on the report.

8.17.1.4.2 Format

This value is a three-digit number plus one decimal place.

8.17.1.5 % of Caseload Assigned/ Actual Participants

8.17.1.5.1 Origin of Data Element

This attribute is calculated by dividing the Caseload Assigned amount for this line by the Caseload Assigned value for this clinic. This calculation is performed for every line item on the report where there is an assigned caseload amount. If an assigned caseload value is not provided, 'n/a' is used in its place.

8.17.1.5.2 Format

This value is a three-digit number plus one decimal place.

8.17.2 Filter Criteria

8.17.2.1 Active Enrollees

All participants that received WIC benefits during the reported month are selected for this report. A value of 'Y' in the Rpted_This_Month attribute of the Caseload_Count table indicates that the participant received WIC benefits during the reported month.

8.17.3 Sort Order

8.17.3.1 Clinic

The report will be sorted by Clinic name within the State.

8.17.3.2 County

The report will be sorted by County name within Clinic name.

8.17.3.3 Municipality

The report will be sorted by Municipality name within County name.

8.17.3.4 WIC Category

The report will be sorted by WIC Category within municipality. The following sequence will be used.

- Pregnant Women
- Breastfeeding Women
- Non-Breastfeeding Women
- Infant
- Children

8.17.4 Control Breaks

8.17.4.1 Clinic

On a change of Clinic name a page break will occur.

8.17.5 Grand Total

A total for all Clinics will be printed as state totals.

8.17.6 Frequency and Distribution

Frequency   - On Demand

Data current as of   - Previous month-end

8.18 Caseload Assigned Comparison – Enrollment Dialog

The Generate Caseload Assigned Comparison - Enrollment Report dialog allows the user to generate a report of the count of participant enrolled in WIC program as compared with the caseload assigned to a clinic. It is invoked when the user selects the Caseload Assigned Comparison - Enrollment list item from the Generate Reports dialog.
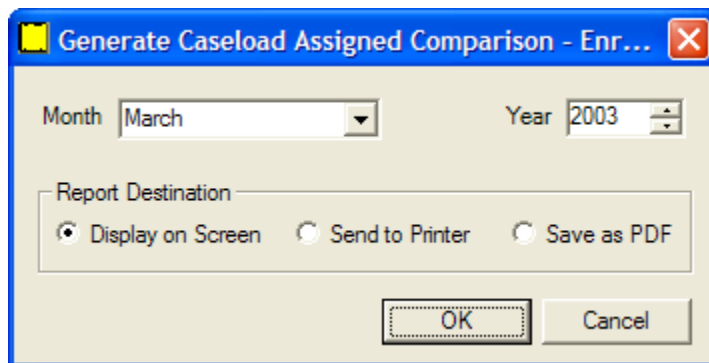
Figure 10 – Generate Caseload Assigned Comparison - Enrollment Report Dialog

8.18.1 Controls

This section describes the behavior of the controls on the Generate Caseload Assigned Comparison - Enrollment Report dialog.

8.18.1.1 Month Dropdown

This control allows the user to select the month to include in the report. The dropdown will be enabled when the Generate Caseload Assigned Comparison - Enrollment Report dialog is active. This will be a read only drop down list. It is filled with a list of months from the Reference Dictionary Entity, which is displayed in calendar month order within the list. It will default to the current month as defined by the Current_Month_End_Date attribute in the Process_Control Entity.

A selection is required.

8.18.1.2 Year Masked Edit Box and Spin Control

This control allows the user to specify the Calendar Year to include in the report. The masked edit box and spin control will be enabled when the Generate Caseload Assigned Comparison - Enrollment Report dialog is active. The masked edit box will only allow the entry of numeric digits. The maximum size of the control will be four (4) characters. The masked edit box will default to the current system year. Selection of the increment or decrement buttons of the spin control will increase or decrease the value by one (1).

An entry is required. The year selected must be less than or equal to the current system year.

8.18.1.3 Report Destination Radio Button

This control allows the user to select either Display on Screen, Send to Printer or Save as PDF. The control will be enabled when the dialog is enabled. It will default to Display on Screen.

8.18.1.4 OK Button

This control allows the user to instruct the system to edit the values of the controls, generate the report, and exit the Generate Caseload Assigned Comparison - Enrollment Report dialog. The OK button will be enabled when the Generate Caseload Assigned Comparison - Enrollment Report dialog is active. (See *Saving the Data* in the Processing section below). Characteristics for the OK button are defined in *Consistencies*.

8.18.1.5 Cancel Button

This control allows the user to exit the Generate Caseload Assigned Comparison - Enrollment Report dialog without generating a report. The Cancel button will be enabled when the Generate Caseload Assigned Comparison - Enrollment Report dialog is active. Characteristics for the Cancel button are defined in *Consistencies*.

8.18.2 Processes

This section describes the processes (navigation) that take place as a result of the actions taken on the Generate Caseload Assigned Comparison - Enrollment Report dialog.

8.18.2.1 Initializing the Interface

Upon initial presentation of the dialog:

- The title bar text will be set to "Generate Caseload Assigned Comparison - Enrollment Report"
- The Month dropdown will default to the current month as defined by the Current_Month_End_Date attribute in the Process_Control table.
- The Year masked edit box will default to the current system year.
- The Report Destination will default to Display on Screen radio button.

8.18.2.2 Edits

Upon selection of the OK button:

- If a selection is not made in the Month Dropdown, the system will invoke a standard error message with the text "A selection is required in the <name of control>."
- If an entry is not made in the Year masked edit box, the system will invoke a standard error message with the text "An entry is required for the <name of control>."
- Month and Year combined values are validated:

- o The value entered in the Year masked edit box must be between 1900 and the current system year or the system will invoke a standard error message with the text "The Year must be between 1900 and the current system year."
- o If the year entered is within the current system year and the month selected is greater than the current system month, the system will invoke a standard error message with the text, "Month and year entered must be less than or equal to current month and year."

8.18.2.3 Generate Caseload Assigned Comparison - Enrollment Report

Upon successful completion of the edits listed above, the system will generate the Caseload Assigned Comparison - Enrollment Report Assigned Report to the selected report destination:

- If Report Destination is Screen, the system will display the report on the screen.
- If Report Destination is Printer, the system will generate the report and send it to the selected other output printer (see *System Tools*).
- If Report Destination is PDF, the system will invoke the "Save As" dialog. The user can select the folder and enter the file name, or cancel. Upon entering a file name and selecting Save, the system will save the file to the selected folder.

8.18.2.4 Cancel

Upon selection of the Cancel button, the system will dismiss the Generate Caseload Assigned Comparison - Enrollment Report dialog without producing the report and return the user to the Generate Reports dialog.

8.19 Caseload Assigned Comparison - Enrollment (Output) CLD024

The Caseload Assigned Comparison - Enrollment report is a month-by-month count of participants by priority who were eligible to receive WIC benefits during the reported month. Participants are counted in every month that he or she is eligible to receive WIC benefits. The enrollment count is compared to the amount of caseload assigned.

Caseload assigned counts are available for pregnant women, breastfeeding women, non-breastfeeding women, infants, and children. Caseload assigned counts are provided by the state quarterly and are based on the previous quarter's funding, weight, and timing for the number of people eligible to be served. Caseload is assigned as of that point in time. If a prior month's report is requested and the caseload assigned data has subsequently been updated, the updated caseload assigned data will be included in the requested report.

Totals are printed by priority for all WIC Category combined. The totals for each WIC Category are also printed. Within the priority totals, high-risk priorities are subtotaled. High-risk priorities are priorities one, two, and three.

Caseload Assigned Comparison - Enrollment

```
CLD024
                              STATE DEPARTMENT OF HEALTH                        RUN DATE MM/DD/CCYY
                           CASELOAD ASSIGNED COMPARISON - ENROLLMENT            RUN TIME HH:MM:SS
                              MONTH OF X X X X X X X X                          PAGE:    XXX
CLINIC  XX                 X_X_X_X_X_X_X_XCLINIC_DESCRIPTIONX_X_X_X_X_X_X_X_X

MONTHLY COUNT           OCT 96 NOV 96 DEC 96 JAN 97 FEB 97 MAR 97 APR 97 MAY 97 JUN 97 JUL 97 AUG 97 SEP 97    C/O
                         C/O    C/O    C/O    30DY   ISSD                                                      AVG
CASELOAD ASSIGNED   3,482

PRIORITY SUMMARY
  TOTAL                 1,620  1,631  1,578  1,617  1,588                                                     1,610
       PERCENT           46.5   46.8   45.3   46.4   45.6                                                      46.2
  PRIORITY 1             520    515    509    532    518                                                       515
       PERCENT           14.9   14.8   14.6   15.3   14.9                                                      14.8
  PRIORITY 2             312    305    268    293    292                                                       295
       PERCENT            9.0    8.8    7.7    8.4    8.4                                                       8.5
  PRIORITY 3             659    684    674    672    660                                                       672
       PERCENT           18.9   19.6   19.4   19.3   19.0                                                      19.3

  SUB-TOTAL 1, 2, & 3   1,491  1,504  1,451  1,497  1,470                                                     1482
       PERCENT           42.8   43.2   41.7   43.0   42.4                                                      42.6

  PRIORITY 4              23     23     23     16     25                                                        23
       PERCENT            0.7    0.7    0.7    0.5    0.7                                                       0.7
  PRIORITY 5              60     57     64     56     48                                                        60
       PERCENT            1.7    1.6    1.8    1.6    1.4                                                       1.7
  PRIORITY 6              34     38     31     34     33                                                        34
       PERCENT            1.0    1.1    0.9    1.0    0.9                                                       1.0
  UNKNOWN                 12      9      9     14     12                                                        10
       PERCENT            0.3    0.3    0.3    0.4    0.3                                                       0.3


1          2         3         4         5         6         7         8         9         0         1         2
1234567890123456789012345678901234567890123456789012345678901234567890123456789012345678901234567890123456789012
```

Caseload Assigned Comparison - Enrollment

```
CLD024
                                        STATE DEPARTMENT OF HEALTH                          RUN DATE MM/DD/CCYY
                                     CASELOAD ASSIGNED COMPARISON - ENROLLMENT              RUN TIME HH:MM:SS
                                            MONTH OF X X X X X X X X                        PAGE:    XXX
CLINIC  XX                       X_X_X_X_X_X_X_XCLINIC_DESCRIPTIONX_X_X_X_X_X_X_X

 MONTHLY COUNT CASELOAD   OCT 96  NOV 96  DEC 96  JAN 97  FEB 97  MAR 97  APR 97  MAY 97  JUN 97  JUL 97  AUG 97  SEP 97     C/O
              ASSIGNED     C/O     C/O     C/O    30DY    ISSD                                                              AVG

WOMEN TOTAL      883       359     371     347     371     375                                                             359
      PERCENT              40.7    42.0    39.3    42.0    42.5                                                            40.7
   PREGNANT      507       269     275     261     280     294                                                             268
      PERCENT              53.1    54.2    51.5    55.2    58.0                                                            53.0
   POSTPARTUM    376        90      96      86      91      81                                                              91
      PERCENT              23.9    25.5    22.9    24.2    21.5                                                            24.1
   BREASTFEEDING            49      49      49      51      43                                                              49
   NON-B/F                  41      47      37      40      38                                                              42

INFANTS TOTAL    667       539     520     490     510     499                                                             516
      PERCENT              80.8    78.0    73.5    76.5    74.8                                                            77.4

CHILDREN TOTAL 1,932       722     740     741     736     714                                                             734
      PERCENT              37.4    38.3    38.4    38.1    37.0                                                            38.0


         1         2         3         4         5         6         7         8         9         0         1         2
123456789012345678901234567890123456789012345678901234567890123456789012345678901234567890123456789012345678901234567890123456789012
```

Caseload Assigned Comparison - Enrollment

```
CLD024
                                      STATE DEPARTMENT OF HEALTH                        RUN DATE MM/DD/CCYY
                                 CASELOAD ASSIGNED COMPARISON - ENROLLMENT              RUN TIME HH:MM:SS
                                       MONTH OF X_X_X_X_X_X_X_X                         PAGE:    XXX
STATE

MONTHLY COUNT            OCT 96  NOV 96  DEC 96  JAN 97  FEB 97  MAR 97  APR 97  MAY 97  JUN 97  JUL 97  AUG 97  SEP 97      C/O
                         C/O     C/O     C/O     30DY    ISSD                                                               AVG
CASELOAD ASSIGNED  3,482

PRIORITY SUMMARY
   TOTAL                 1,620   1,631   1,578   1,617   1,588                                                             1,610
        PERCENT           46.5    46.8    45.3    46.4    45.6                                                              46.2
   PRIORITY 1             520     515     509     532     518                                                               515
        PERCENT           14.9    14.8    14.6    15.3    14.9                                                              14.8
   PRIORITY 2             312     305     268     293     292                                                               295
        PERCENT            9.0     8.8     7.7     8.4     8.4                                                               8.5
   PRIORITY 3             659     684     674     672     660                                                               672
        PERCENT           18.9    19.6    19.4    19.3    19.0                                                              19.3

   SUB-TOTAL 1, 2, & 3   1,491   1,504   1,451   1,497   1,470                                                             1482
        PERCENT           42.8    43.2    41.7    43.0    42.4                                                              42.6

   PRIORITY 4              23      23      23      16      25                                                                23
        PERCENT            0.7     0.7     0.7     0.5     0.7                                                               0.7
   PRIORITY 5              60      57      64      56      48                                                                60
        PERCENT            1.7     1.6     1.8     1.6     1.4                                                               1.7
   PRIORITY 6              34      38      31      34      33                                                                34
        PERCENT            1.0     1.1     0.9     1.0     0.9                                                               1.0
   UNKNOWN                 12       9       9      14      12                                                                10
        PERCENT            0.3     0.3     0.3     0.4     0.3                                                               0.3


1        2         3         4         5         6         7         8         9         0         1         2
123456789012345678901234567890123456789012345678901234567890123456789012345678901234567890123456789012345678901234567890123456789012
```

Caseload Assigned Comparison - Enrollment

```
CLD024
                                    STATE DEPARTMENT OF HEALTH                      RUN DATE MM/DD/CCYY
                              CASELOAD ASSIGNED COMPARISON - ENROLLMENT             RUN TIME HH:MM:SS
                                     MONTH OF X_X_X_X_X_X_X_X                       PAGE:    XXX
STATE

MONTHLY COUNT   CASELOAD  OCT 96  NOV 96  DEC 96  JAN 97  FEB 97  MAR 97  APR 97  MAY 97  JUN 97  JUL 97  AUG 97  SEP 97        C/O
                ASSIGNED   C/O     C/O     C/O     30DY    ISSD                                                                 AVG
                _____

WOMEN TOTAL        883      359     371     347     371     375                                                                359
    PERCENT                40.7    42.0    39.3    42.0    42.5                                                                40.7
    PREGNANT       507      269     275     261     280     294                                                                268
    PERCENT                53.1    54.2    51.5    55.2    58.0                                                                53.0
    POSTPARTUM     376       90      96      86      91      81                                                                 91
    PERCENT                23.9    25.5    22.9    24.2    21.5                                                                24.1
    BREASTFEEDING            49      49      49      51      43                                                                 49
    NON-B/F                  41      47      37      40      38                                                                 42

INFANTS TOTAL      667      539     520     490     510     499                                                                516
    PERCENT                80.8    78.0    73.5    76.5    74.8                                                                77.4

CHILDREN TOTAL   1,932      722     740     741     736     714                                                                734
    PERCENT                37.4    38.3    38.4    38.1    37.0                                                                38.0


        1         2         3         4         5         6         7         8         9         0         1         2
123456789012345678901234567890123456789012345678901234567890123456789012345678901234567890123456789012345678901234567890123456789012
```

8.19.1 Data Elements

The enrollment totals are a month-by-month count of participants who were eligible to receive WIC benefits during the reported months. A value of 'Y' in the Enrolled_This_Month attribute of the Caseload_Count_EnrollmentEntity indicates that the participant was eligible to receive WIC benefits during the reported month.

The state office will provide the caseload assigned values. A value should be provided for every clinic. If a value is not provided for a clinic, 'n/a' is used in its place.

8.19.1.1 Caseload Assigned (Clinic/Priority)

8.19.1.1.1 Origin of Data Element

This value will come from the Total_Assigned_Caseload attribute of the Assigned_Caseload Entity. The clinic total is the total of all category values for the clinic. The state total is an accumulation of the clinic totals.

8.19.1.1.2 Format

This value is an eight-digit number.

8.19.1.2 Caseload Assigned per WIC Category

8.19.1.2.1 Origin of Data Element

This value will come from the Assigned_Caseload attribute of the Status_Assigned_Caseload Entity.

8.19.1.2.2 Format

This value is an eight-digit number.

8.19.1.3 Priority Summary Total (Monthly Count)

8.19.1.3.1 Origin of Data Element

This attribute is calculated by totaling the number of participants who are eligible to receive WIC benefits during the reported month.

8.19.1.3.2 Format

This value is a six-digit number.

8.19.1.4 Priority Total (Monthly Count)

8.19.1.4.1 Origin of Data Element

This attribute is calculated by accumulating the count of the number of participants who were eligible to receive WIC benefits during the reported month for each applicable priority. If a participant's priority value is unknown or is a value that is not valid for the WIC Category, the count is accumulated in an 'UNKNOWN' priority.

8.19.1.4.2 Format

This value is a six-digit number.

8.19.1.5 Category Total (Monthly Count)

8.19.1.5.1 Origin of Data Element

This attribute is calculated by accumulating the count of the number of participants who were eligible to receive WIC benefits during the reported month for each WIC Category. The total for all women is a summation of all priorities for all women categories.

8.19.1.5.2 Format

This value is a six-digit number.

8.19.1.6 Percent (Monthly)

8.19.1.6.1 Origin of Data Element

This attribute is calculated by dividing the applicable line total for the month by the total Caseload Assigned count for the clinic/state.

If no Caseload Assigned amount was given by the State a value of 'n/a' will be shown on the report.

8.19.1.6.2 Format

This value is a three-digit number plus one decimal place.

8.19.1.7 C/O Avg

8.19.1.7.1 Origin of Data Element

This attribute is calculated by totaling the values in the row for closeout months and dividing the accumulated total by the number of closeout months included.

8.19.1.7.2 Format

This value is a six-digit number.

8.19.2 Filter Criteria

All participants who were eligible to receive WIC benefits during the reported months are included in the counts for the reported months. A value of 'Y' in the Enrolled_This_Month attribute of the Caseload_Count_EnrollmentEntity indicates that the participant was eligible to receive WIC benefits during the reported month.

8.19.2.1 Sort Order

8.19.2.1.1 Clinic Identifier

The report will be sorted by clinic identifier.

8.19.2.2 Control Breaks

8.19.2.2.1 Clinic Identifier

On a change of clinic identifier a page break will occur.

8.19.2.3 Grand Total

The totals for all clinics will be printed as state totals.

8.19.3 Frequency and Distribution

Frequency - On demand

Data current as of - Previous month-end

8.20 Caseload Assigned Comparison – Reported Participation Dialog

The Generate Caseload Assigned Comparison - Reported Participation Report dialog allows the user to generate a report of the reported participation count compared with the caseload assigned to a clinic. It is invoked when the user selects the Caseload assigned comparison - Reported Participation list item from the Generate Reports dialog.
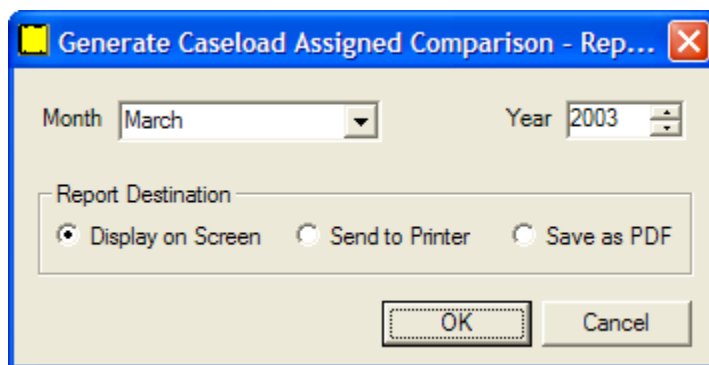
Figure 11 – Generate Caseload Assigned Comparison – Reported Participation Report Dialog

8.20.1 Controls

This section describes the behavior of the controls on the Generate Caseload Assigned Comparison - Reported Participation Report dialog.

8.20.1.1 Month Dropdown

This control allows the user to select the month to include in the report. The dropdown will be enabled when the Generate Caseload Assigned Comparison - Reported Participation Report dialog is active. This will be a read only drop down list. It is filled with a list of months from the Reference Dictionary Entity, which is displayed in calendar month order within the list. It will default to the current month as defined by the Current_Month_End_Date attribute in the Process_Control Entity.

A selection is required.

8.20.1.2 Year Masked Edit Box and Spin Control

This control allows the user to specify the Calendar Year to include in the report. The masked edit box and spin control will be enabled when the Generate Caseload Assigned Comparison - Reported Participation Report dialog is active. The masked edit box will only allow the entry of numeric digits. The maximum size of the control will be four (4) characters. The masked edit box will default to the current system year. Selection of the increment or decrement buttons of the spin control will increase or decrease the value by one (1).

An entry is required. The year selected must be less than or equal to the current system year.

8.20.1.3 Report Destination Radio Button

This control allows the user to select either Display on Screen, Send to Printer or Save as PDF. The control will be enabled when the dialog is enabled. It will default to Display on Screen.

8.20.1.4 OK Button

This control allows the user to instruct the system to edit the values of the controls, generate the report, and exit the Generate Caseload Assigned Comparison - Reported Participation Report dialog. The OK button will be enabled when the Generate Caseload Assigned Comparison - Reported Participation Report dialog is active. (See *Saving the Data* in the Processing section below). Characteristics for the OK button are defined in *Consistencies*.

8.20.1.5 Cancel Button

This control allows the user to exit the Generate Caseload Assigned Comparison - Reported Participation Report dialog without generating a report. The Cancel button will be enabled when the Generate Caseload Assigned Comparison - Reported Participation Report dialog is active. Characteristics for the Cancel button are defined in *Consistencies*.

8.20.2 Processes

This section describes the processes (navigation) that take place as a result of the actions taken on the Generate Caseload Assigned Comparison - Reported Participation Report dialog.

8.20.2.1 OK

Upon selection of the OK button, the system will initiate a check for required and valid information.

If any required information has not been entered in a dropdown, the system will invoke a standard error message with the text "A selection is required in the <name of control>."

If any control contains a value that is not considered legitimate, the system will display the appropriate standard error message.

 Month and Year combined values are validated:

- The value entered in the Year masked edit box must be between 1900 and the current system year or the system will invoke a standard error message with the text "The Year must be between 1900 and the current system year."
- If the year entered is within the current system year and the month selected is greater than the current system month, the system will invoke a standard error message with the text, "Month and year entered must be less than or equal to current month and year."

Upon dismissal of the standard error message box, the system will automatically position the cursor to the attribute in error to facilitate error correction.

Once the controls have been validated, the system will send the Caseload Assigned Comparison - Reported Participation report described in to the selected output device.

If the selected Output is "PDF", a standard Dialogs Save File dialog is displayed. Upon entering the report destination, file name and selecting the Save button, the report will be generated and saved in the specified directory. Upon selecting the Cancel button, the system will invoke a standard error message with the text, "If you choose to save the report, then you must choose a path for the report." Upon dismissal of the message box, the system will return to the Dialogs Save file dialog.

8.20.2.2 Cancel

Upon selection of the Cancel button, the system will dismiss the Generate Caseload Assigned Comparison - Reported Participation Report dialog without producing the report and return the user to the Generate Reports dialog.

8.21 Caseload Assigned Comparison – Reported Participation (Output) CLD025

The Caseload Assigned Comparison - Reported Participation report is a month-by-month count of participants who were received WIC benefits during the reported month. Participants are counted in every month that he or she received WIC benefits. The reported participation count is compared to the amount of caseload assigned.

Caseload assigned counts are available for pregnant women, breastfeeding women, non-breastfeeding women, infants and children. Caseload assigned counts are provided by the state quarterly and are based on the previous quarter's funding, weight, and timing for the number of people eligible to be served. Caseload is assigned as of that point in time. If a prior month's report is requested and the caseload assigned data has subsequently been updated, the updated caseload assigned data will be included in the requested report.

Totals are printed by WIC Category.

Caseload Assigned Comparison – Reported Participation

```
CLD025
                              < STATE NAME DEPARTMENT OF HEALTH >                    RUN DATE MM/DD/CCYY
                        CASELOAD ASSIGNED COMPARISON – REPORTED PARTICIPATION         RUN TIME HH:MM:SS
                                      MONTH OF MARCH 2003                             PAGE:    XXX
<CLINIC>

 MONTHLY COUNT CASELOAD  OCT 96  NOV 96  DEC 96  JAN 97  FEB 97  MAR 97  APR 97  MAY 97  JUN 97  JUL 97  AUG 97  SEP 97     C/O
               ASSIGNED   C/O     C/O     C/O     30DY    ISSD                                                             AVG
               _____

WOMEN TOTAL       883      359     371     347     371     375                                                             359
      PERCENT             40.7    42.0    39.3    42.0    42.5                                                            40.7
    PREGNANT      507      269     275     261     280     294                                                             268
      PERCENT             53.1    54.2    51.5    55.2    58.0                                                            53.0
    POSTPARTUM    376       90      96      86      91      81                                                              91
      PERCENT             23.9    25.5    22.9    24.2    21.5                                                            24.1
    BREASTFEEDING           49      49      49      51      43                                                              49
    NON-B/F                 41      47      37      40      38                                                              42

INFANTS TOTAL     667      539     520     490     510     499                                                             516
      PERCENT             80.8    78.0    73.5    76.5    74.8                                                            77.4
    FORMULA NON-REBATE      32      19      12       7       4                                                              21
      PERCENT              4.8     2.8     1.8     1.0     0.6                                                             3.1
    FORMULA REBATE         507     501     478     503     495                                                             495
      PERCENT             76.0    75.1    71.7    75.4    74.2                                                            74.3

CHILDREN TOTAL  1,932      722     740     741     736     714                                                             734
      PERCENT             37.4    38.3    38.4    38.1    37.0                                                            38.0


        1         2         3         4         5         6         7         8         9         0         1         2
1234567890123456789012345678901234567890123456789012345678901234567890123456789012345678901234567890123456789012345678901234567890123456789012
```

Caseload Assigned Comparison – Reported Participation

```
CLD025
                          < STATE NAME DEPARTMENT OF HEALTH >                       RUN DATE MM/DD/CCYY
                  CASELOAD ASSIGNED COMPARISON – REPORTED PARTICIPATION             RUN TIME HH:MM:SS
                                 MONTH OF MARCH 2003                                PAGE:    XXX
STATE TOTALS

MONTHLY COUNT   CASELOAD   OCT 96  NOV 96  DEC 96  JAN 97  FEB 97  MAR 97  APR 97  MAY 97  JUN 97  JUL 97  AUG 97  SEP 97       C/O
                ASSIGNED    C/O     C/O     C/O    30DY    ISSD                                                                AVG
_____

WOMEN TOTAL        883      359     371     347     371     375                                                               359
        PERCENT            40.7    42.0    39.3    42.0    42.5                                                               40.7
    PREGNANT       507      269     275     261     280     294                                                               268
        PERCENT            53.1    54.2    51.5    55.2    58.0                                                               53.0
    POSTPARTUM     376       90      96      86      91      81                                                                91
        PERCENT            23.9    25.5    22.9    24.2    21.5                                                               24.1
    BREASTFEEDING           49      49      49      51      43                                                                49
    NON-B/F                 41      47      37      40      38                                                                42

INFANTS TOTAL      667      539     520     490     510     499                                                               516
        PERCENT            80.8    78.0    73.5    76.5    74.8                                                               77.4
    FORMULA NON-REBATE      32      19      12       7       4                                                                21
        PERCENT             4.8     2.8     1.8     1.0     0.6                                                                3.1
    FORMULA REBATE         507     501     478     503     495                                                               495
        PERCENT            76.0    75.1    71.7    75.4    74.2                                                               74.3

CHILDREN TOTAL   1,932      722     740     741     736     714                                                               734
        PERCENT            37.4    38.3    38.4    38.1    37.0                                                               38.0


        1         2         3         4         5         6         7         8         9         0         1         2
123456789012345678901234567890123456789012345678901234567890123456789012345678901234567890123456789012345678901234567890123456789012
```

8.21.1 Data Elements

The totals are a month-by-month count of participants who were received WIC benefits during the reported months. A value of 'Y' in the Rpted_This_Month attribute of the Caseload_Count entity indicates that the participant was received WIC benefits during the reported month.

The state office will provide the caseload assigned values. A value should be provided for every clinic. If a value is not provided for a clinic, 'n/a' is used in its place.

8.21.1.1 Caseload Assigned (Clinic/Priority)

8.21.1.1.1 Origin of Data Element

This value will come from the Total_Assigned_Caseload attribute of the Assigned_Caseload entity. The clinic total is the total of all category values for the clinic. The state total is an accumulation of the clinic totals.

8.21.1.1.2 Format

This value is an eight-digit number.

8.21.1.2 Caseload Assigned per WIC Category

8.21.1.2.1 Origin of Data Element

This value will come from the Assigned_Caseload attribute of the Status_Assigned_Caseload entity.

8.21.1.2.2 Format

This value is an eight-digit number.

8.21.1.2.3 Format

This value is a six-digit number.

8.21.1.3 Category Total (Monthly Count)

8.21.1.3.1 Origin of Data Element

This attribute is calculated by accumulating the count of the number of participants who received WIC benefits during the reported month for each WIC Category. The total for all women is a summation of all priorities for all women categories. The total for infants is broken out by infants that received a rebate formula and those that did not. Infants that received a rebate formula food instrument will have a value greater than zero in the Count_FI_Issued_Rebate attribute of the Caseload_Count entity.

8.21.1.3.2 Format

This value is a six-digit number.

8.21.1.4 Percent (Monthly)

8.21.1.4.1 Origin of Data Element

This attribute is calculated by dividing the applicable line total for the month by the total Caseload Assigned count for the clinic/state.

If no Caseload Assigned amount was given by the State a value of 'n/a' will be shown on the report.

8.21.1.4.2 Format

This value is a three-digit number plus one decimal place.

8.21.1.5 C/O Avg

8.21.1.5.1 Origin of Data Element

This attribute is calculated by totaling the values in the row for closeout months and dividing the accumulated total by the number of closeout months included.

8.21.1.5.2 Format

This value is a six-digit number.

8.21.2 Filter Criteria

All participants who received WIC benefits during the reported months are included in the counts for the reported months. A value of 'Y' in the Rpted_This_Month attribute of the Caseload_Count entity indicates that the participant received WIC benefits during the reported month.

8.21.2.1 Sort Order

8.21.2.1.1 Clinic Identifier

The report will be sorted by clinic identifier.

8.21.2.2 Control Breaks

8.21.2.2.1 Clinic Identifier

On a change of clinic identifier a page break will occur.

8.21.2.3 Grand Total

The totals for all clinics will be printed as state totals.

8.21.3 Frequency and Distribution

Frequency   - On demand

Data current as of   - Previous month-end

8.22 Reported Participation WIC – Monthly Unduplicated Dialog

The Generate Reported Participation WIC – Monthly Unduplicated Report dialog allows the user to generate a report of the number of participants that were participating in WIC during the time period. It is invoked when the user selects the Reported Participation WIC – Monthly Unduplicated list item from the Generate Reports dialog.
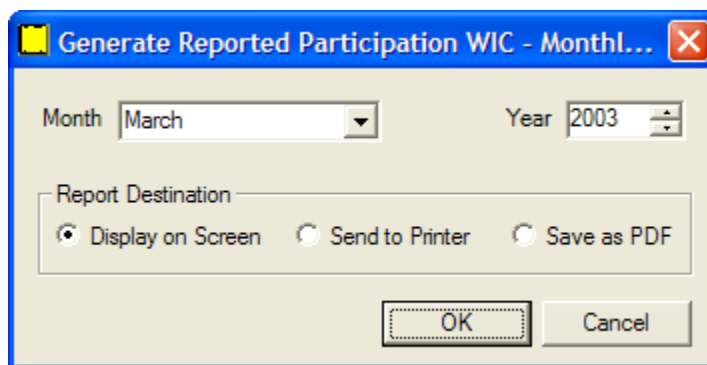
Figure 12 – Generate Reported Participation WIC – Monthly Unduplicated Report Dialog

8.22.1 Controls

This section describes the behavior of the controls on the Generate Reported Participation WIC – Monthly Unduplicated Report dialog.

8.22.1.1 Month Dropdown

This control allows the user to select the month to include in the report. The dropdown will be enabled when the Generate Reported Participation WIC – Monthly Unduplicated Report dialog is active. This will be a read only drop down list. It is filled with a list of months from the Reference Dictionary Entity, which is displayed in calendar month order within the list. It will default to the current month as defined by the Current_Month_End_Date attribute in the Process_Control entity.

A selection is required.

8.22.1.2 Year Masked Edit Box and Spin Control

This control allows the user to specify the Calendar Year to include in the report. The masked edit box and spin control will be enabled when the Generate Reported Participation WIC – Monthly Unduplicated Report dialog is active. The masked edit box will only allow the entry of numeric digits. The maximum size of the control will be four (4) characters. The masked edit box will default to the current system year. Selection of the increment or decrement buttons of the spin control will increase or decrease the value by one (1).

An entry is required. The year selected must be less than or equal to the current system year.

8.22.1.3 Report Destination Radio Button

This control allows the user to select either Display on Screen, Send to Printer or Save as PDF. The control will be enabled when the dialog is enabled. It will default to Display on Screen.

8.22.1.4 OK Button

This control allows the user to instruct the system to edit the values of the controls, generate the report and exit the Generate Reported Participation WIC – Monthly Unduplicated Report dialog. The OK button will be enabled when the Generate Reported Participation WIC – Monthly Unduplicated Report dialog is active. (See *Saving the Data* in the Processing section below). Characteristics for the OK button are defined in *Consistencies*.

8.22.1.5 Cancel Button

This control allows the user to exit the Generate Reported Participation WIC – Monthly Unduplicated Report dialog without generating a report. The Cancel button will be enabled when the Generate Reported Participation WIC – Monthly Unduplicated Report dialog is active. Characteristics for the Cancel button are defined in *Consistencies*.

8.22.2 Processes

This section describes the processes (navigation) that take place as a result of the actions taken on the Generate Reported Participation WIC – Monthly Unduplicated Report dialog.

8.22.2.1 Initializing the Interface

Upon initial presentation of the dialog:

- The title bar text will be set to "Generate Reported Participation WIC – Monthly Unduplicated Report"
- The Month dropdown will default to the current month as defined by the Current_Month_End_Date attribute in the Process_Control table.
- The Year masked edit box will default to the current system year.
- The Report Destination will default to Display on Screen radio button.

8.22.2.2 Edits

Upon selection of the OK button:

- If a selection is not made in the Month Dropdown, the system will invoke a standard error message with the text "A selection is required in the <name of control>."
- If an entry is not made in the Year masked edit box, the system will invoke a standard error message with the text "An entry is required for the <name of control>."

- Month and Year combined values are validated:
  - The value entered in the Year masked edit box must be between 1900 and the current system year or the system will invoke a standard error message with the text "The Year must be between 1900 and the current system year."
  - If the year entered is within the current system year and the month selected is greater than the current system month, the system will invoke a standard error message with the text, "Month and year entered must be less than or equal to current month and year."

8.22.2.3 Generate Reported Participation WIC – Monthly Unduplicated Report

Upon successful completion of the edits listed above, the system will generate the Reported Participation WIC – Monthly Unduplicated Report Assigned Report to the selected report destination:

- If Report Destination is Screen, the system will display the report on the screen.
- If Report Destination is Printer, the system will generate the report and send it to the selected other output printer (see *System Tools*).
- If Report Destination is PDF, the system will invoke the "Save As" dialog. The user can select the folder and enter the file name, or cancel. Upon entering a file name and selecting Save, the system will save the file to the selected folder.

8.22.2.4 Cancel

Upon selection of the Cancel button, the system will dismiss the Generate Reported Participation WIC - Monthly Unduplicated Report dialog without producing the report and return the user to the Generate Reports dialog.

8.23 Reported Participation WIC – Monthly Unduplicated (Output) CLD026

Monthly unduplicated reported participation is a month-by-month count of people who were issued at least one WIC food instrument with a first date to use in that reported month. Depending on the front-end system, the first date to use may be the same as the participation date. Participants are counted in every month that he or she was issued a WIC food instrument. Totals on this report should match the Number of Participants Issued Food Instruments report for the same reported month.

This report accumulates totals for the federal fiscal year beginning in October and ending in September.

The issue month will be indicated with ISSD under the month name. The 30-day status month will be indicated with 30DY under the month name. When closeout for a month has been reached, C/O will print under the month name. The report is cumulative to allow the count of participants to be followed monthly from the issue month until closeout. Once a month has reached closeout, the counts will not change for that month.

If the category for a participant changes during a reported month, the category assigned on the last Food Instrument issued to the participant for that month will be used. If the participant transfers between clinics, the participant will be included in the counts for the clinic that last issued a food instrument to the participant.

Reported Participation WIC - Monthly Unduplicated

```
CLD026
                                          <STATE NAME DEPARTMENT OF HEALTH>                               RUN DATE MM/DD/CCYY
                                          REPORTED PARTICIPATION – MONTHLY UNDUPLICATED                   RUN TIME HH:MM:SS
                                                           WIC                                            PAGE:     XXX
       MONTH OF MARCH 2003
<CLINIC>
<COUNTY>

                   OCT 96   NOV 96   DEC 96   JAN 97   FEB 97   MAR 97   APR 97   MAY 97   JUN 97   JUL 97   AUG 97   SEP 97     C/O
                   C/O      C/O      C/O      30DY     ISSD                                                                      AVG

UNDUPLICATED (SERVED BY I.D.)

TOTAL            XXX,XXX  XXX,XXX  XXX,XXX  XXX,XXX  XXX,XXX  XXX,XXX  XXX,XXX  XXX,XXX  XXX,XXX  XXX,XXX  XXX,XXX  XXX,XXX  XXX,XXX

WOMAN TOTAL      XXX,XXX  XXX,XXX  XXX,XXX  XXX,XXX  XXX,XXX  XXX,XXX  XXX,XXX  XXX,XXX  XXX,XXX  XXX,XXX  XXX,XXX  XXX,XXX  XXX,XXX
 PREGNANT        XXX,XXX  XXX,XXX  XXX,XXX  XXX,XXX  XXX,XXX  XXX,XXX  XXX,XXX  XXX,XXX  XXX,XXX  XXX,XXX  XXX,XXX  XXX,XXX  XXX,XXX
 BREASTFEEDING   XXX,XXX  XXX,XXX  XXX,XXX  XXX,XXX  XXX,XXX  XXX,XXX  XXX,XXX  XXX,XXX  XXX,XXX  XXX,XXX  XXX,XXX  XXX,XXX  XXX,XXX
 NON-B/F         XXX,XXX  XXX,XXX  XXX,XXX  XXX,XXX  XXX,XXX  XXX,XXX  XXX,XXX  XXX,XXX  XXX,XXX  XXX,XXX  XXX,XXX  XXX,XXX  XXX,XXX

INFANT TOTAL     XXX,XXX  XXX,XXX  XXX,XXX  XXX,XXX  XXX,XXX  XXX,XXX  XXX,XXX  XXX,XXX  XXX,XXX  XXX,XXX  XXX,XXX  XXX,XXX  XXX,XXX

CHILDREN TOTAL XXX,XXX  XXX,XXX  XXX,XXX  XXX,XXX  XXX,XXX  XXX,XXX  XXX,XXX  XXX,XXX  XXX,XXX  XXX,XXX  XXX,XXX  XXX,XXX  XXX,XXX


         1          2         3         4         5         6         7         8         9         0         1         2
12345678901234567890123456789012345678901234567890123456789012345678901234567890123456789012345678901234567890123456789012345678901234567890
12
```

Reported Participation WIC - Monthly Unduplicated

```
CLD026
                                    <STATE NAME DEPARTMENT OF HEALTH>                          RUN DATE MM/DD/CCYY
                                 REPORTED PARTICIPATION - MONTHLY UNDUPLICATED                  RUN TIME HH:MM:SS
                                                    WIC                                         PAGE:    XXX
       MONTH OF MARCH 2003
<CLINIC>


                OCT 96   NOV 96   DEC 96   JAN 97   FEB 97   MAR 97   APR 97   MAY 97   JUN 97   JUL 97   AUG 97   SEP 97    C/O
                 C/O      C/O      C/O      30DY     ISSD                                                                    AVG
_____

UNDUPLICATED (SERVED BY I.D.)

TOTAL           XXX,XXX  XXX,XXX  XXX,XXX  XXX,XXX  XXX,XXX  XXX,XXX  XXX,XXX  XXX,XXX  XXX,XXX  XXX,XXX  XXX,XXX  XXX,XXX  XXX,XXX

WOMAN TOTAL     XXX,XXX  XXX,XXX  XXX,XXX  XXX,XXX  XXX,XXX  XXX,XXX  XXX,XXX  XXX,XXX  XXX,XXX  XXX,XXX  XXX,XXX  XXX,XXX  XXX,XXX
 PREGNANT       XXX,XXX  XXX,XXX  XXX,XXX  XXX,XXX  XXX,XXX  XXX,XXX  XXX,XXX  XXX,XXX  XXX,XXX  XXX,XXX  XXX,XXX  XXX,XXX  XXX,XXX
 BREASTFEEDING  XXX,XXX  XXX,XXX  XXX,XXX  XXX,XXX  XXX,XXX  XXX,XXX  XXX,XXX  XXX,XXX  XXX,XXX  XXX,XXX  XXX,XXX  XXX,XXX  XXX,XXX
 NON-B/F        XXX,XXX  XXX,XXX  XXX,XXX  XXX,XXX  XXX,XXX  XXX,XXX  XXX,XXX  XXX,XXX  XXX,XXX  XXX,XXX  XXX,XXX  XXX,XXX  XXX,XXX

INFANT TOTAL    XXX,XXX  XXX,XXX  XXX,XXX  XXX,XXX  XXX,XXX  XXX,XXX  XXX,XXX  XXX,XXX  XXX,XXX  XXX,XXX  XXX,XXX  XXX,XXX  XXX,XXX

CHILDREN TOTAL  XXX,XXX  XXX,XXX  XXX,XXX  XXX,XXX  XXX,XXX  XXX,XXX  XXX,XXX  XXX,XXX  XXX,XXX  XXX,XXX  XXX,XXX  XXX,XXX  XXX,XXX


         1        2        3        4        5        6        7        8        9        0        1        2
12345678901234567890123456789012345678901234567890123456789012345678901234567890123456789012345678901234567890123456789012
```

Reported Participation WIC - Monthly Unduplicated

```
CLD026
                                    <STATE NAME DEPARTMENT OF HEALTH>                    RUN DATE MM/DD/CCYY
                                  REPORTED PARTICIPATION – MONTHLY UNDUPLICATED           RUN TIME HH:MM:SS
                                                    WIC                                   PAGE:    XXX
        MONTH OF MARCH 2003
STATE


                 OCT 96    NOV 96    DEC 96    JAN 97    FEB 97    MAR 97    APR 97    MAY 97    JUN 97    JUL 97    AUG 97    SEP 97     C/O
                  C/O       C/O       C/O       30DY      ISSD                                                                         AVG

UNDUPLICATED (SERVED BY I.D.)

TOTAL           XXX,XXX   XXX,XXX   XXX,XXX   XXX,XXX   XXX,XXX   XXX,XXX   XXX,XXX   XXX,XXX   XXX,XXX   XXX,XXX   XXX,XXX   XXX,XXX   XXX,XXX

 PREGNANT       XXX,XXX   XXX,XXX   XXX,XXX   XXX,XXX   XXX,XXX   XXX,XXX   XXX,XXX   XXX,XXX   XXX,XXX   XXX,XXX   XXX,XXX   XXX,XXX   XXX,XXX
 BREASTFEEDING  XXX,XXX   XXX,XXX   XXX,XXX   XXX,XXX   XXX,XXX   XXX,XXX   XXX,XXX   XXX,XXX   XXX,XXX   XXX,XXX   XXX,XXX   XXX,XXX   XXX,XXX
 NON-B/F        XXX,XXX   XXX,XXX   XXX,XXX   XXX,XXX   XXX,XXX   XXX,XXX   XXX,XXX   XXX,XXX   XXX,XXX   XXX,XXX   XXX,XXX   XXX,XXX   XXX,XXX

INFANT TOTAL    XXX,XXX   XXX,XXX   XXX,XXX   XXX,XXX   XXX,XXX   XXX,XXX   XXX,XXX   XXX,XXX   XXX,XXX   XXX,XXX   XXX,XXX   XXX,XXX   XXX,XXX

CHILDREN TOTAL XXX,XXX   XXX,XXX   XXX,XXX   XXX,XXX   XXX,XXX   XXX,XXX   XXX,XXX   XXX,XXX   XXX,XXX   XXX,XXX   XXX,XXX   XXX,XXX   XXX,XXX


         1         2         3         4         5         6         7         8         9         0         1         2
123456789012345678901234567890123456789012345678901234567890123456789012345678901234567890123456789012345678901234567890123456789012
```

8.23.1 Data Elements

The reported participation totals are a monthly-unduplicated count of participants who were issued at least one WIC food instrument. A value of 'Y' in the Rpted_This_Month attribute of the Caseload_Count entity indicates that the participant has received a food instrument for the reported month. A value of '0' in the Program_Code attribute of the Caseload_Count entity indicates data for the WIC program. The participant's county is from enrollment data as of the end of the reported month.

8.23.1.1 Total (Monthly Count)

8.23.1.1.1 Origin of Data Element

This attribute is calculated by counting the number of people who received a WIC food instrument with a first date to use in the reported month. It is the summation of all category totals (pregnant, breastfeeding, non-breastfeeding, infants, and children).

8.23.1.1.2 Format

This value is a six-digit number.

8.23.1.2 Category Total (Monthly Count)

8.23.1.2.1 Origin of Data Element

This attribute is calculated by counting the number of people by category that received a WIC food instrument with a first date to use in the month. The person will be counted in the latest category they were served in during the reported month.

The total for all women is a summation of all women category (pregnant, breastfeeding, and non-breastfeeding).

8.23.1.2.2 Format

This value is a six-digit number.

8.23.1.3 C/O Avg

8.23.1.3.1 Origin of Data Element

This attribute is calculated by totaling the values in the row for closeout months and dividing the accumulated total by the number of closeout months included.

8.23.1.3.2 Format

This value is a six-digit number.

8.23.2 Filter Criteria

All participants that received a WIC food instrument with a first date to use in the month are included in the counts for the reported months. Each participant is counted in the totals for one clinic, category and priority.

8.23.2.1 Sort Order

8.23.2.1.1 Clinic Identifier

The report will be sorted by clinic and county.

8.23.2.2 Control Breaks

8.23.2.2.1 Clinic Identifier

On a change of clinic identifier a page break will occur.

8.23.2.2.2 County Identifier

On a change of county identifier a page break will occur.

8.23.2.3 Grand Total

The totals for all clinics will be printed as state totals.

8.23.3 Frequency and Distribution

Frequency - On demand

Data current as of - Previous month-end

8.24 Redeemed Participation WIC – Monthly Unduplicated Dialog

The Generate Redeemed Participation WIC – Monthly Unduplicated Report
dialog allows the user to generate a report of the number of participants that
were participating in WIC in the time period based on redeemed food
instruments. It is invoked when the user selects the Redeemed Participation
WIC – Monthly Unduplicated list item from the Generate Reports dialog.
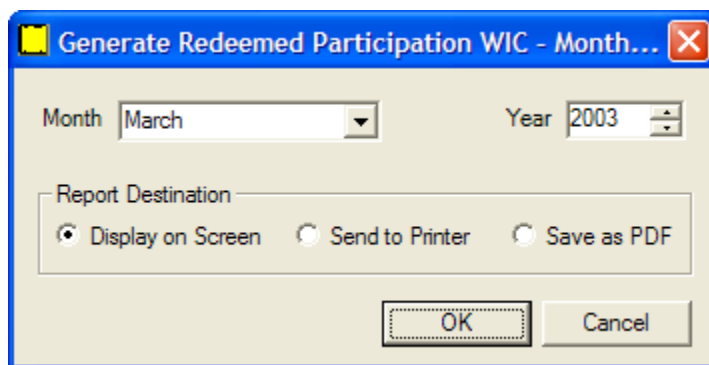
Figure 13 – Generate Redeemed Participation WIC –Monthly Unduplicated Report Dialog

8.24.1 Controls

This section describes the behavior of the controls on the Generate Redeemed
Participation WIC – Monthly Unduplicated Report dialog.

8.24.1.1 Month Dropdown

This control allows the user to select the month to include in the report.
The dropdown will be enabled when the Generate Redeemed Participation
WIC – Monthly Unduplicated Report dialog is active. This will be a read
only drop down list. It is filled with a list of months from the Reference
Dictionary Entity, which is displayed in calendar month order within the
list. It will default to the current month as defined by the
Current_Month_End_Date attribute in the Process_Control entity.

A selection is required.

8.24.1.2 Year Masked Edit Box and Spin Control

This control allows the user to specify the Calendar Year to include in the
report. The masked edit box and spin control will be enabled when the
Generate Redeemed Participation WIC – Monthly Unduplicated Report
dialog is active. The masked edit box will only allow the entry of numeric
digits. The maximum size of the control will be four (4) characters. The
masked edit box will default to the current system year. Selection of the
increment or decrement buttons of the spin control will increase or
decrease the value by one (1).

An entry is required. The year selected must be less than or equal to the
current system year.

8.24.1.3 Report Destination Radio Button

This control allows the user to select either Display on Screen, Send to Printer or Save as PDF. The control will be enabled when the dialog is enabled. It will default to Display on Screen.

8.24.1.4 OK Button

This control allows the user to instruct the system to edit the values of the controls, generate the report, and exit the Generate Redeemed Participation WIC – Monthly Unduplicated Report dialog. The OK button will be enabled when the Generate Redeemed Participation WIC – Monthly Unduplicated Report dialog is active. (See *Saving the Data* in the Processing section below). Characteristics for the OK button are defined in *Consistencies*.

8.24.1.5 Cancel Button

This control allows the user to exit the Generate Redeemed Participation WIC – Monthly Unduplicated Report dialog without generating a report. The Cancel button will be enabled when the Generate Redeemed Participation WIC – Monthly Unduplicated Report dialog is active. Characteristics for the Cancel button are defined in *Consistencies*.

8.24.2 Processes

This section describes the processes (navigation) that take place as a result of the actions taken on the Generate Redeemed Participation WIC – Monthly Unduplicated Report dialog.

8.24.2.1 Initializing the Interface

Upon initial presentation of the dialog:

- The title bar text will be set to "Generate Redeemed Participation WIC – Monthly Unduplicated Report"
- The Month dropdown will default to the current month as defined by the Current_Month_End_Date attribute in the Process_Control table.
- The Year masked edit box will default to the current system year.
- The Report Destination will default to Display on Screen radio button.

8.24.2.2 Edits

Upon selection of the OK button:

- If a selection is not made in the Month Dropdown, the system will invoke a standard error message with the text "A selection is required in the <name of control>."
- If an entry is not made in the Year masked edit box, the system will invoke a standard error message with the text "An entry is required for the <name of control>."

- Month and Year combined values are validated:
  - o The value entered in the Year masked edit box must be between 1900 and the current system year or the system will invoke a standard error message with the text "The Year must be between 1900 and the current system year."
  - o If the year entered is within the current system year and the month selected is greater than the current system month, the system will invoke a standard error message with the text, "Month and year entered must be less than or equal to current month and year."

8.24.2.3 Generate Redeemed Participation WIC – Monthly Unduplicated Report

Upon successful completion of the edits listed above, the system will generate the Redeemed Participation WIC – Monthly Unduplicated Report Assigned Report to the selected report destination:

- If Report Destination is Screen, the system will display the report on the screen.
- If Report Destination is Printer, the system will generate the report and send it to the selected other output printer (see *System Tools*).
- If Report Destination is PDF, the system will invoke the "Save As" dialog. The user can select the folder and enter the file name, or cancel. Upon entering a file name and selecting Save, the system will save the file to the selected folder.

8.24.2.4 Cancel

Upon selection of the Cancel button, the system will dismiss the Generate Redeemed Participation WIC – Monthly Unduplicated Report dialog without producing the report and return the user to the Generate Reports dialog.

8.25 Redeemed Participation WIC – Monthly Unduplicated (Output) CLD027

Monthly unduplicated redeemed participation is a month-by-month count of people who were issued at least one WIC food instrument with a first date to use in that reported month and at least one of those WIC food instruments was presented for payment. Depending on the front-end system, the first date to use may be the same as the participation date. Food instruments are considered presented for payment when either payment data is processed or the banking agent rejects the food instrument for payment.

Participants are counted in every month that he or she was issued a WIC food instrument and a food instrument has been presented for payment.

This report accumulates totals for the federal fiscal year beginning in October and ending in September.

The issue month will be indicated with ISSD under the month name. The 30-day status month will be indicated with 30DY under the month name. When closeout for a month has been reached, C/O will print under the month name. The report is cumulative to allow the count of participants to be followed monthly from the issue month until closeout. Once a month has reached closeout, the counts will not change for that month.

If the category for a participant changes during a reported month, the category assigned on the last food instrument issued to the participant for that month will be used. If the participant transfers between clinics, the participant will be included in the counts for the clinic that last issued a food instrument to the participant.

Redeemed Participation WIC - Monthly Unduplicated

```
CLD027
                                    STATE DEPARTMENT OF HEALTH                          RUN DATE MM/DD/CCYY
                              REDEEMED PARTICIPATION – MONTHLY UNDUPLICATED              RUN TIME HH:MM:SS
                                                  WIC                                        PAGE:    XXX
                                         MONTH OF X_X_X_X_X_X_X_X
CLINIC  XXX                      X_X_X_X_X_X_X_XCLINIC_DESCRIPTIONX_X_X_X_X_X_X_X


               OCT 96   NOV 96   DEC 96   JAN 97   FEB 97   MAR 97   APR 97   MAY 97   JUN 97   JUL 97   AUG 97   SEP 97     C/O
                C/O      C/O      C/O      30DY     ISSD                                                                     AVG

UNDUPLICATED (SERVED BY I.D.)

TOTAL          XXX,XXX  XXX,XXX  XXX,XXX  XXX,XXX  XXX,XXX  XXX,XXX  XXX,XXX  XXX,XXX  XXX,XXX  XXX,XXX  XXX,XXX  XXX,XXX  XXX,XXX

WOMAN TOTAL    XXX,XXX  XXX,XXX  XXX,XXX  XXX,XXX  XXX,XXX  XXX,XXX  XXX,XXX  XXX,XXX  XXX,XXX  XXX,XXX  XXX,XXX  XXX,XXX  XXX,XXX
 PREGNANT      XXX,XXX  XXX,XXX  XXX,XXX  XXX,XXX  XXX,XXX  XXX,XXX  XXX,XXX  XXX,XXX  XXX,XXX  XXX,XXX  XXX,XXX  XXX,XXX  XXX,XXX
 BREASTFEEDING XXX,XXX  XXX,XXX  XXX,XXX  XXX,XXX  XXX,XXX  XXX,XXX  XXX,XXX  XXX,XXX  XXX,XXX  XXX,XXX  XXX,XXX  XXX,XXX  XXX,XXX
 NON-B/F       XXX,XXX  XXX,XXX  XXX,XXX  XXX,XXX  XXX,XXX  XXX,XXX  XXX,XXX  XXX,XXX  XXX,XXX  XXX,XXX  XXX,XXX  XXX,XXX  XXX,XXX

INFANT TOTAL   XXX,XXX  XXX,XXX  XXX,XXX  XXX,XXX  XXX,XXX  XXX,XXX  XXX,XXX  XXX,XXX  XXX,XXX  XXX,XXX  XXX,XXX  XXX,XXX  XXX,XXX

CHILDREN TOTAL XXX,XXX  XXX,XXX  XXX,XXX  XXX,XXX  XXX,XXX  XXX,XXX  XXX,XXX  XXX,XXX  XXX,XXX  XXX,XXX  XXX,XXX  XXX,XXX  XXX,XXX


     1         2         3         4         5         6         7         8         9         0         1         2
123456789012345678901234567890123456789012345678901234567890123456789012345678901234567890123456789012345678901234567890123456789012
```

Redeemed Participation WIC - Monthly Unduplicated

```
CLD027
                                   STATE DEPARTMENT OF HEALTH                              RUN DATE MM/DD/CCYY
                           REDEEMED PARTICIPATION – MONTHLY UNDUPLICATED                   RUN TIME HH:MM:SS
                                              WIC                                          PAGE:    XXX
                                  MONTH OF X_X_X_X_X_X_X_X
STATE


                 OCT 96   NOV 96   DEC 96   JAN 97   FEB 97   MAR 97   APR 97   MAY 97   JUN 97   JUL 97   AUG 97   SEP 97     C/O
                 C/O      C/O      C/O      30DY     ISSD                                                                     AVG

UNDUPLICATED (SERVED BY I.D.)

TOTAL            XXX,XXX  XXX,XXX  XXX,XXX  XXX,XXX  XXX,XXX  XXX,XXX  XXX,XXX  XXX,XXX  XXX,XXX  XXX,XXX  XXX,XXX  XXX,XXX  XXX,XXX

WOMAN TOTAL      XXX,XXX  XXX,XXX  XXX,XXX  XXX,XXX  XXX,XXX  XXX,XXX  XXX,XXX  XXX,XXX  XXX,XXX  XXX,XXX  XXX,XXX  XXX,XXX  XXX,XXX
 PREGNANT        XXX,XXX  XXX,XXX  XXX,XXX  XXX,XXX  XXX,XXX  XXX,XXX  XXX,XXX  XXX,XXX  XXX,XXX  XXX,XXX  XXX,XXX  XXX,XXX  XXX,XXX
 BREASTFEEDING   XXX,XXX  XXX,XXX  XXX,XXX  XXX,XXX  XXX,XXX  XXX,XXX  XXX,XXX  XXX,XXX  XXX,XXX  XXX,XXX  XXX,XXX  XXX,XXX  XXX,XXX
 NON-B/F         XXX,XXX  XXX,XXX  XXX,XXX  XXX,XXX  XXX,XXX  XXX,XXX  XXX,XXX  XXX,XXX  XXX,XXX  XXX,XXX  XXX,XXX  XXX,XXX  XXX,XXX

INFANT TOTAL     XXX,XXX  XXX,XXX  XXX,XXX  XXX,XXX  XXX,XXX  XXX,XXX  XXX,XXX  XXX,XXX  XXX,XXX  XXX,XXX  XXX,XXX  XXX,XXX  XXX,XXX

CHILDREN TOTAL   XXX,XXX  XXX,XXX  XXX,XXX  XXX,XXX  XXX,XXX  XXX,XXX  XXX,XXX  XXX,XXX  XXX,XXX  XXX,XXX  XXX,XXX  XXX,XXX  XXX,XXX


        1         2         3         4         5         6         7         8         9         0         1         2
123456789012345678901234567890123456789012345678901234567890123456789012345678901234567890123456789012345678901234567890123456789012
```

8.25.1 Data Elements

The redeemed participation totals are a monthly-unduplicated count of participants who were issued at least one WIC food instrument and at least one food instrument was presented to the bank for payment. A value of 'Y' in the Rdmd_This_Month attribute of the Caseload_Count entity indicates that the participant has received a food instrument for the reported month and a food instrument was presented to the banking agent. A value of '0' in the Program_Code attribute of the Caseload_Count entity indicates data for the WIC program.

8.25.1.1 Total (Monthly Count)

8.25.1.1.1 Origin of Data Element

This attribute is calculated by counting the number of people who received a WIC food instrument with a first date to use in the reported month and at least one of those food instruments was presented for payment. It is the summation of all category totals (pregnant, breastfeeding, non-breastfeeding, infants, and children).

8.25.1.1.2 Format

This value is a six-digit number.

8.25.1.2 Category Total (Monthly Count)

8.25.1.2.1 Origin of Data Element

This attribute is calculated by counting the number of people by category that received a WIC food instrument with a first date to use in the month and presented at least one food instrument for payment. The person will be counted in the latest category they were served in during the reported month.

The total for all women is a summation of all women category (pregnant, breastfeeding, and non-breastfeeding).

8.25.1.2.2 Format

This value is a six-digit number.

8.25.1.3 C/O Avg

8.25.1.3.1 Origin of Data Element

This attribute is calculated by totaling the values in the row for closeout months and dividing the accumulated total by the number of closeout months included.

8.25.1.3.2 Format

This value is a six-digit number.

8.25.2 Filter Criteria

All participants that received a WIC food instrument with a first date to use in the month and at least one of those food instruments was presented for payment are included in the counts for the reported months. Each participant is counted in the totals for one clinic, category and priority.

8.25.2.1 Sort Order

8.25.2.1.1 Clinic Identifier

The report will be sorted by clinic identifier.

8.25.2.2 Control Breaks

8.25.2.2.1 Clinic Identifier

On a change of clinic identifier a page break will occur.

8.25.2.3 Grand Total

The totals for all clinics will be printed as state totals.

8.25.3 Frequency and Distribution

Frequency   - On demand

Data current as of   - Previous month-end

8.26 PC20XX (Create USDA Minimum Data Set)

Every two years, WIC participant information is reported to the US Department of Agriculture, Food and Nutrition Service. These reports provide the most comprehensive and up to date statistics on the WIC programs. The information is used to estimate budgets, design research, and review current and proposed WIC policies and procedures. Data is collected in even number years and includes:

- Information on the income and nutritional risk of WIC participants.
- Data on WIC program participation for migrant farm worker families.
- Other information on WIC participation that is deemed appropriate by the Secretary of Agriculture.

The data elements required are detailed in Guidance for States Providing WIC Participant Data, WIC Participant and Program Characteristics PC2004 documentation as published by US Department of Agriculture, Food and Nutrition Service.

In order to produce this report and to insure the ability to reproduce it as maybe required, a static duplicate of the system database is necessary. The creation of the static database is the responsibility of the system's Database Administrator and should be generated from a backup of the system database after the close of business on the last day of the month for the reporting period. US Department of Agriculture, Food and Nutrition Service request that the state retain the report data and materials for at least three years.

The user must supply the database information on the PC20XX File Generation dialog in order to create the static duplicate database. This dialog is invoked when the user selects the PC20XX list item from the Generate Reports dialog.
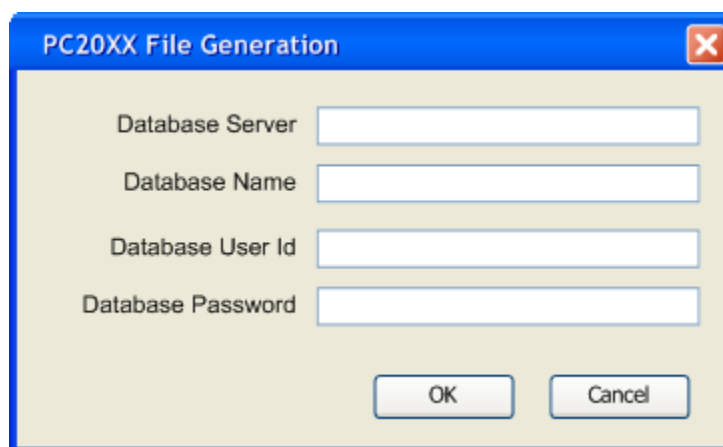
Figure 14– PC20XX File Generation Dialog

8.26.1 Controls

This section describes the behavior of the controls on the Generate PC20XX File Status dialog.

8.26.1.1 Database Server Text Box

The Database Server text box will be enabled when the dialog is active. It will allow a maximum of 20 alphanumeric characters. No special characters are allowed.

8.26.1.2 Database Name Text Box

The Database Name text box will be enabled when the dialog is active. It will allow a maximum of 20 alphanumeric characters. No special characters are allowed.

8.26.1.3 Database User ID

The Database User ID text box will be enabled when the dialog is active. It will allow a maximum of 20 alphanumeric characters. No special characters are allowed.

8.26.1.4 Database Password

The Database Password text box will be enabled when the dialog is active. It will allow a maximum of 20 alphanumeric characters. No special characters are allowed. Entered text will be masked with asterisks.

8.26.1.5 OK Button

The OK button will be enabled when the dialog is active. Characteristics for the OK button are defined in *Consistencies*.

8.26.1.6 Cancel Button

The Cancel button will be enabled when the dialog is active. Characteristics for the Cancel button are defined in *Consistencies*.

8.26.2 Processes

This section describes the processes (navigation) that take place as a result of the actions taken on the PC20XX File Generation dialog.

8.26.2.1 Initializing the Interface

Upon initial display of the dialog:

- The title bar text will be set to "PC20XX File Generation".
- All fields will default to blank.

8.26.2.2 Edits

Upon selection of the OK button:

- If the following controls are blank,
    - o   Database Server Text Box
    - o   Database Name Text Box
    - o   Database User ID Text Box
    - o   Database Password Text Box

The system will display a standard message box with the message text, "An entry is required for the {control label}."

- If the Database Server or Database Name are invalid, the system will display a standard message box with the message text, "Database does not exist."
- If the Database User ID or Database Password are invalid, the system will display a standard message box with the message text, "Invalid User ID/Password."

8.26.2.3 Cancel

Upon selection of the Cancel button on the PC20XX File Generation dialog, the system will dismiss the PC20XX File Generation dialog and return the user to the Generate Reports dialog.

8.26.2.4 Generate PC20XX File

Upon successful completion of the above listed edits, the system will display the Generating PC20XX File progress bar and begin the file generation.
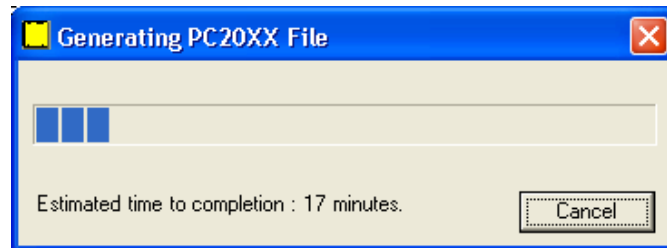
Figure 15– Generate PC20XX File (Progress Bar) Dialog

8.26.2.4.1 File Generation Progress Bar

The File Generation Progress Bar will indicate the current level of completion for the PC20XX file generation processes.

8.26.2.4.2 Estimated time to completion: XX minutes.

This control will display the estimated time to completion.

8.26.2.4.3 Cancel Button

The Cancel button on the Generating PC20XX File (Progress Bar) dialog will be enabled when the Generate PC20XX File Status dialog is active. Characteristics for the Cancel button are defined in *Consistencies*.

Upon selection of the Cancel button on the Generate PC20XX File (Progress Bar) dialog, the system will display a warning message, "Are you sure you want to terminate the PC20XX file generation?". If the user selects yes, the process is terminated and the user is returned to the Generate Reports dialog. If the user selects No, the file generation process continues.

8.27 PC20XX Output File

The PC2004 Output File is an ASCII text file in a fixed-width format. The data elements required are detailed in Guidance for States Providing WIC Participant Data, WIC Participant and Program Characteristics PC2004 documentation as published by US Department of Agriculture, Food and Nutrition Service.

8.27.1 Data Elements

8.27.1.1 State Clinic ID

This value will be the FNS 10-Digit Identification Code referencing the first 7 digits and not including the 3 digit. Explanation: In the FNS Identification Code, the 3 digit is always 9 for WIC purposes. This number should not be entered for the Minimum Data Set.

8.27.1.1.1 Origin of Data Element

The value will be taken from the FEDSTATECD attribute of the STATE_PROFILE entity.

8.27.1.1.2 Format

The value will print as a 6 character string, column position 1-6.

8.27.1.2 Clinic/Site Number

This value will be the clinic or site where the participant is currently certificated.

8.27.1.2.1 Origin of Data Element

The value will be taken from the CLINICID attribute of the MEMBER entity unless the participant has been transferred. If the participant had been transferred after the start of the reporting period, the value will be taken from the FROMCLINICID attribute of the TRANSFERHISTORY entity. If the transfer was made before the start of the reporting period, the value is to be taken from the TOCLINICID attribute of the TRANSFERHISTORY entity.

8.27.1.2.2 Format

The value will print as a 3 character string, left justified with trailing spaces, column position 7-9.

8.27.1.3 Case ID

This value will be a unique identifier for each participant record and which maintains individual privacy at the national level.

8.27.1.3.1 Origin of Data Element

The value will be taken from the STATEWICID attribute of the MEMBER entity. The first four characters will be transposed with the last four characters to create a unique identifier that is not the same as used by system.

8.27.1.3.2 Format

The value will print as an 11 character string, left justified with trailing spaces, column position 10-20.

8.27.1.4 Date of Participant's Birth

This value will be the Date of Birth for the participant.

8.27.1.4.1 Origin of Data Element

The value will be taken from the DATEOFBIRTH attribute of the MEMBER entity.

8.27.1.4.2 Format

The value will print as an 8 character string, in the "MMDDYYYY" format, column position 21-28.

8.27.1.5 Participant's Race/Ethnic Status

This value will be the Date of Birth for the participant.

8.27.1.5.1 Origin of Data Element

The value will be taken from the RACEETHNICITY attribute of the MEMBER entity.

8.27.1.5.2 Format

The value will print as a single character string, column position 29.

8.27.1.6 Certification Category

This value will be the WIC Category for the participant. Certification category must be reported for all participants. This item may not be blank.

8.27.1.6.1 Origin of Data Element

The value will be taken from the WICSTATUS attribute of the MEMBER entity converted to a corresponding numeric value.

- 1 = Pregnant Woman (P)
- 2 = Breastfeeding Woman (B)
- 3 = Postpartum Woman, not breastfeeding (N)
- 4 = Infant (under 12 months) (I)
- 5 = Child (12-59 months) (C)

8.27.1.6.2 Format

The value will print as a single character string, column position 30.

8.27.1.7 Expected Date of Delivery

This value will be the Expected Date of Delivery. This item may be supplied instead of Weeks Gestation.

8.27.1.7.1 Origin of Data Element

The value will be taken from the EXPDELIVDATE attribute of the PREGNANCY entity.

8.27.1.7.2 Format

The value will print as an 8 character string in the "MMDDYYYY" format, column position 31-38.

8.27.1.8 Number of Weeks Gestation

This value will be the number of weeks since pregnant woman's last menstrual period. This item may be supplied instead of Expected Date of Delivery.

8.27.1.8.1 Origin of Data Element

The value will be taken from the WEEKSGESTATION attribute of the CHILD entity.

8.27.1.8.2 Format

The value will print as a 2 character string, left justified with trailing spaces, column position 39-40.

8.27.1.9 Date of Certification

This value will be the effective date of the participant current certification during the reporting period.

8.27.1.9.1 Origin of Data Element

The value will be taken from the CERTEFFECTIVEDATE attribute of the CERTCONTACT entity.

8.27.1.9.2 Format

The value will print as an 8 character string, in the "MMDDYYYY" format, column position 41-48.

8.27.1.10 Participant's Sex

This value will be the gender of the participant.

8.27.1.10.1 Origin of Data Element

The value will be taken from the GENDER attribute of the MEMBER entity converted to a corresponding numeric value.

- 1 = Male (M)
- 2 = Female (F)

8.27.1.10.2 Format

The value will print as a single character string, column position 49.

8.27.1.11 Risk Priority Code

This value will be the assigned priority of the participant current certification during the reporting period.

8.27.1.11.1 Origin of Data Element

The value will be taken from the CERTASSIGNEDPRIORITY attribute of the CERTCONTACT entity.

8.27.1.11.2 Format

The value will print as a single character string, column position 50.

8.27.1.12 Participation in Other Programs - TANF

Does the participant receive TANF (Temporary Assistance to Needy Families) benefits?

8.27.1.12.1 Origin of Data Element

The value will be taken from the TANF attribute of the INCOMECONTACT entity converted to a corresponding numeric value.

- 1 = Yes (Y)
- 2 = No (N)

8.27.1.12.2 Format

The value will print as a single character string, column position 51.

8.27.1.13 Participation in Other Programs – Food Stamps

Does the participant Food Stamps?

8.27.1.13.1 Origin of Data Element

The value will be taken from the FOODSTAMPS attribute of the INCOMECONTACT entity converted to a corresponding numeric value.

- 1 = Yes (Y)
- 2 = No (N)

8.27.1.13.2 Format

The value will print as a single character string, column position 52.

8.27.1.14 Participation in Other Programs – Medicaid

Does the participant Medicaid benefits?

8.27.1.14.1 Origin of Data Element

The value will be taken from the MEDICAID attribute of the INCOMECONTACT entity converted to a corresponding numeric value.

- 1 = Yes (Y)
- 2 = No (N)

8.27.1.14.2 Format

The value will print as a single character string, column position 53.

8.27.1.15 Migrant Status

Is any member of the family a migrant worker?

8.27.1.15.1 Origin of Data Element

The value will be taken from the MIGRANT attribute of the HOUSEHOLD entity converted to a corresponding numeric value.

- 1 = Yes (Y)
- 2 = No (N)

8.27.1.15.2 Format

The value will print as a single character string, column position 54.

8.27.1.16 Number in Economic Unit

This value will be the number of persons in the economic unit upon which the income eligibility is based.

8.27.1.16.1 Origin of Data Element

The value will be taken from the HOUSEHOLDSIZE attribute of the INCOMECONTACT entity.

8.27.1.16.2 Format

The value will print as a 2 character string, left justified with trailing spaces, column position 55-56.

8.27.1.17 Number in Economic Unit

This value will be the number of persons in the economic unit upon which the income eligibility is based. Number in economic unit must be reported for all participants.

8.27.1.17.1 Origin of Data Element

The value will be taken from the HOUSEHOLDSIZE attribute of the INCOMECONTACT entity. Zero is not valid for this item.

8.27.1.17.2 Format

The value will print as a 2 character string, left justified with trailing spaces, column position 55-56.

8.27.1.18 Family Income

This value will be the income as determined during the certification process.

8.27.1.18.1 Origin of Data Element

The value will be taken from the ANNUALAMOUNT attribute of the INCOMECONTACT entity

8.27.1.18.2 Format

The value will print as a 5 character string, left justified with trailing spaces, column position 57-61.

8.27.1.19 Income Period

This value will be the income period as determined during the certification process.

8.27.1.19.1 Origin of Data Element

The value will be taken from the DURATION attribute of the INCOMEITEM entity converted to a corresponding numeric value.

- 1 = Weekly
- 2 = Monthly
- 3 = Biweekly (every two weeks)
- 4 = Annually

8.27.1.19.2 Format

The value will print as a single character string, column position 62.

8.27.1.20 Income Ranges for Participants with Adjunct Eligibility

This value will be the income period as determined during the certification process.

8.27.1.20.1 Origin of Data Element

The value will be taken from the DURATION attribute of the INCOMEITEM entity converted to a corresponding numeric value as based upon Federal WIC Regulations, Section 246.7(d)(2)(vi-vii).

8.27.1.20.2 Format

The value will print as a 2 character string, column position 63-64.

8.27.1.21 Nutritional Risk #1

This value will be the first nutritional risk present at certification.

8.27.1.21.1 Origin of Data Element

The value will be taken from the RISKFACTORID attribute of the RISKFACTOR entity.

8.27.1.21.2 Format

The value will print as a 4 character string, left justified with trailing spaces, column position 65-68.

8.27.1.22 Nutritional Risk #2

This value will be the second nutritional risk present at certification.

8.27.1.22.1 Origin of Data Element

The value will be taken from the RISKFACTORID attribute of the RISKFACTOR entity.

8.27.1.22.2 Format

The value will print as a 4 character string, left justified with trailing spaces, column position 69-72.

8.27.1.23 Nutritional Risk #3

This value will be the third nutritional risk present at certification.

8.27.1.23.1 Origin of Data Element

The value will be taken from the RISKFACTORID attribute of the RISKFACTOR entity.

8.27.1.23.2 Format

The value will print as a 4 character string, left justified with trailing spaces, column position 73-76.

8.27.1.24 Hemoglobin

This value will be for the measure of iron status that applies to the reporting certification.

8.27.1.24.1 Origin of Data Element

The value will be taken from the HEMOGLOBIN attribute of the BLOODWORK entity with a single implied decimal place. For example, 29.6 should be coded as 296.

8.27.1.24.2 Format

The value will print as a 3 character string, left justified with trailing spaces, column position 77-79.

8.27.1.25 Hematocrit

This value will be for the measure of iron status that applies to the reporting certification.

8.27.1.25.1 Origin of Data Element

The value will be taken from the HEMATOCRIT attribute of the BLOODWORK entity with a single implied decimal place. For example, 29.6 should be coded as 296.

8.27.1.25.2 Format

The value will print as a 3 character string, left justified with trailing spaces, column position 80-82.

8.27.1.26 Participant's Weight in Pounds

This value will be for the participant's weight in whole pounds that applies to the reporting certification. This item may be supplied instead of metric weight.

8.27.1.26.1 Origin of Data Element

The value will be taken from the WEIGHTPOUNDS attribute of the ANTHROPCONTACT entity.

8.27.1.26.2 Format

The value will print as a 3 character string, left justified with trailing spaces, column position 83-85.

8.27.1.27 The Nearest Quarter Pound of Participant's Weight

This value will be for the participant's weight in the nearest quarter pounds that applies to the reporting certification. This item may be supplied instead of metric weight.

8.27.1.27.1 Origin of Data Element

The value will be taken from the WEIGHTOUNCES attribute of the ANTHROPCONTACT entity.

8.27.1.27.2 Format

The value will print as a single character string, column position 86.

8.27.1.28 Participant's Weight in Grams

This value will be for the participant's weight in grams that applies to the reporting certification. This item may be supplied instead of weight in pounds.

8.27.1.28.1 Origin of Data Element

The value is not available, field will be left blank.

8.27.1.28.2 Format

The value will print as a 6 character string, left justified with trailing spaces, column position 87-92.

8.27.1.29 Participant's Height in Inches

This value will be for the participant's height in whole inches that applies to the reporting certification. This item may be supplied instead of height in centimeters.

8.27.1.29.1 Origin of Data Element

The value will be taken from the LENGTHINCHES attribute of the ANTHROPCONTACT entity.

8.27.1.29.2 Format

The value will print as a 2 character string, left justified with trailing spaces, column position 93-94.

8.27.1.30 The Nearest Eight of an Inch of Participant's Height

This value will be for the participant's height in the nearest eight of an inch that applies to the reporting certification. This item may be supplied instead of height in centimeters.

8.27.1.30.1 Origin of Data Element

The value will be taken from the LENGTHEIGHTHS attribute of the ANTHROPCONTACT entity.

8.27.1.30.2 Format

The value will print as a single character string, column position 95.

8.27.1.31 Participant's Height in Centimeters

This value will be for the participant's height in centimeters that applies to the reporting certification. This item may be supplied instead of height in inches.

8.27.1.31.1 Origin of Data Element

The value is not available, field will be left blank.

8.27.1.31.2 Format

The value will print as a 4 character string, left justified with trailing spaces, column position 96-99.

8.27.1.32 Date of Height and Weight Measurement

This value will be the date at which the height and weight measurements where taken for the participant.

8.27.1.32.1 Origin of Data Element

The value will be taken from the MEASUREMENTDATE attribute of the ANTHROPCONTACT entity.

8.27.1.32.2 Format

The value will print as an 8 character string, in the "MMDDYYYY" format, column position 100-107.

8.27.1.33 Currently Breastfeeding

For infants and children ages six months through thirteen months during the reporting period who are currently being breastfed.

8.27.1.33.1 Origin of Data Element

The value will be taken from the CURRENTLYBREASTFED attribute of the CHILD entity converted to a corresponding numeric value.

- 1 = Yes (Y)
- 2 = No (N)

8.27.1.33.2 Format

The value will print as a single character string, column position 108.

8.27.1.34 Ever Breastfed

For infants and children ages six months through thirteen months during the reporting period who are currently not being breastfed.

8.27.1.34.1 Origin of Data Element

The value will be taken from the EVERBREASTFED attribute of the CHILD entity converted to a corresponding numeric value.

- 1 = Yes (Y)
- 2 = No (N)

8.27.1.34.2 Format

The value will print as a single character string, column position 109.

8.27.1.35 Length of Time Breastfed

This value is the number of weeks the infant or child received breast milk for infants and children ages six months through thirteen months during the reporting period.

8.27.1.35.1 Origin of Data Element

The value will be taken from calculation of the number of weeks from the participant's DATEOFBIRTH attribute of the MEMBER entity and the BREASTFEEDINGEND attribute of the CHILD entity, converted to a corresponding numeric value ranging from 0-56.

8.27.1.35.2 Format

The value will print as a 2 character string, left justified with trailing spaces, column position 110-111.

8.27.1.36 Date Breastfeeding Data Collected

This value will be the date at which the breastfeeding data was collected for the infant or child participant.

8.27.1.36.1 Origin of Data Element

The value will be taken from the BFINFORMATIONDATE attribute of the CHILD entity.

8.27.1.36.2 Format

The value will print as an 8 character string, in the "MMDDYYYY" format, column position 112-119.

8.27.1.37 Food Package Code #1

This value is the 1st food package code for food instruments issued to the participant during the reporting period.

8.27.1.37.1 Origin of Data Element

The value will be taken from FOODINSTRUMENTTYPE attribute of the FOODINSTRUMENT entity.

8.27.1.37.2 Format

The value will print as a 10 character string, left justified with trailing spaces, column position 120-129.

8.27.1.38 Food Package Code #2

This value is the 2nd food package code for food instruments issued to the participant during the reporting period.

8.27.1.38.1 Origin of Data Element

The value will be taken from FOODINSTRUMENTTYPE attribute of the FOODINSTRUMENT entity.

8.27.1.38.2 Format

The value will print as a 10 character string, left justified with trailing spaces, column position 130-139.

8.27.1.39 Food Package Code #3

This value is the 3rd food package code for food instruments issued to the participant during the reporting period.

8.27.1.39.1 Origin of Data Element

The value will be taken from FOODINSTRUMENTTYPE attribute of the FOODINSTRUMENT entity.

8.27.1.39.2 Format

The value will print as a 10 character string, left justified with trailing spaces, column position 140-149.

8.27.1.40 Food Package Code #4

This value is the 4th food package code for food instruments issued to the participant during the reporting period.

8.27.1.40.1 Origin of Data Element

The value will be taken from FOODINSTRUMENTTYPE attribute of the FOODINSTRUMENT entity.

8.27.1.40.2 Format

The value will print as a 10 character string, left justified with trailing spaces, column position 150-159.

8.27.1.41 Food Package Code #5

This value is the 5th food package code for food instruments issued to the participant during the reporting period.

8.27.1.41.1 Origin of Data Element

The value will be taken from FOODINSTRUMENTTYPE attribute of the FOODINSTRUMENT entity.

8.27.1.41.2 Format

The value will print as a 10 character string, left justified with trailing spaces, column position 160-169.

8.27.1.42 Food Package Code #6

This value is the 6th food package code for food instruments issued to the participant during the reporting period.

8.27.1.42.1 Origin of Data Element

The value will be taken from FOODINSTRUMENTTYPE attribute of the FOODINSTRUMENT entity.

8.27.1.42.2 Format

The value will print as a 10 character string, left justified with trailing spaces, column position 170-179.

8.27.1.43 Food Package Code #7

This value is the 7th food package code for food instruments issued to the participant during the reporting period.

8.27.1.43.1 Origin of Data Element

The value will be taken from FOODINSTRUMENTTYPE attribute of the FOODINSTRUMENT entity.

8.27.1.43.2 Format

The value will print as a 10 character string, left justified with trailing spaces, column position 180-189.

8.27.1.44 Food Package Code #8

This value is the 8th food package code for food instruments issued to the participant during the reporting period.

8.27.1.44.1 Origin of Data Element

The value will be taken from FOODINSTRUMENTTYPE attribute of the FOODINSTRUMENT entity.

8.27.1.44.2 Format

The value will print as a 10 character string, left justified with trailing spaces, column position 190-199.

8.27.1.45 Food Package Code #9

This value is the 9th food package code for food instruments issued to the participant during the reporting period.

8.27.1.45.1 Origin of Data Element

The value will be taken from FOODINSTRUMENTTYPE attribute of the FOODINSTRUMENT entity.

8.27.1.45.2 Format

The value will print as a 10 character string, left justified with trailing spaces, column position 200-209.

8.27.1.46 Food Package Code #10

This value is the 9th food package code for food instruments issued to the participant during the reporting period.

8.27.1.46.1 Origin of Data Element

The value will be taken from FOODINSTRUMENTTYPE attribute of the FOODINSTRUMENT entity.

8.27.1.46.2 Format

The value will print as a 10 character string, left justified with trailing spaces, column position 210-219.

8.27.1.47 Date of First WIC Certification

This value will be the date at which the participant was first certified for WIC services.

8.27.1.47.1 Origin of Data Element

The value will be taken from the CERTEFFECTIVEDATE attribute of the CERTCONTACT entity.

8.27.1.47.2 Format

The value will print as an 8 character string, in the "MMDDYYYY" format, column position 220-227.

8.27.1.48 Education Level

This value will be the highest grade of school completed by women.

8.27.1.48.1 Origin of Data Element

The value will be taken from the EDUCATIONLEVEL attribute of the MEMBER entity converted to a corresponding numeric value (0-12) grade school or (13, 14, 15, etc…) for years of college. Allowable values are 0-18.

8.27.1.48.2 Format

The value will print as a 2 character string, left justified with trailing spaces, column position 228-229.

8.27.1.49 Number in Household in WIC

This value will be the number of people in the participant's household enrolled in WIC.

8.27.1.49.1 Origin of Data Element

The value will be taken from a count of the HOUSEHOLDID attribute of the MEMBER entity for all participants in the same household.

8.27.1.49.2 Format

The value will print as a 2 character string, left justified with trailing spaces, column position 230-231.

8.27.1.50 Source of Prenatal Care

This value has been deleted. Leave column blank.

8.27.1.51 Source of Prenatal Care

This value has been deleted.

8.27.1.51.1 Origin of Data Element

Leave column blank.

8.27.1.51.2 Format

The value will print as a single character string, column position 232.

8.27.1.52 Date of Prenatal Care Began

This value has been deleted.

8.27.1.52.1 Origin of Data Element

Leave columns blank.

8.27.1.52.2 Format

The value will print as an 8 character string, column position 233-240.

8.27.1.53 Date Pervious Pregnancy Ended

This value will be the date at which the pervious pregnancy ended

8.27.1.53.1 Origin of Data Element

The value will be taken from the LASTPREGEND attribute of the PREGNANCY entity. The day of the month is not included in this value, therefore insert two blank spaces for the day. Example: "01__2004".

8.27.1.53.2 Format

The value will print as an 8 character string, in the "MMDDYYYY" format, column position 241-248.

8.27.1.54 Total Number of Pregnancies

This value will be the total number times the woman participant has been pregnant, including this pregnancy and any pregnancies resulting in birth, miscarriage, abortion, or stillbirth having been reported.

8.27.1.54.1 Origin of Data Element

The value will be taken from the NUMBEROFPREGNANCIES attribute of the PREGNANCY entity.

8.27.1.54.2 Format

The value will print as a 2 character string, left justified with trailing spaces, column position 249-250.

8.27.1.55 Total Number of Live Births

This value will be the total number of babies born alive to this woman participant, including those infants who may have died shortly after birth.

8.27.1.55.1 Origin of Data Element

The value will be taken from the NUMBERLIVEBIRTHS attribute of the PREGNANCY entity.

8.27.1.55.2 Format

The value will print as a 2 character string, left justified with trailing spaces, column position 251-252.

8.27.1.56 Prepregnancy Weight in Pounds

This value will be for the participant's weight immediately prior to pregnancy in whole pounds. This item may be supplied instead of prepregnancy weight in grams.

8.27.1.56.1 Origin of Data Element

The value will be taken from the PREPREGWEIGHT attribute of the PREGNANCY entity.

8.27.1.56.2 Format

The value will print as a 3 character string, left justified with trailing spaces, column position 253-255.

8.27.1.57 The Nearest Quarter Pound of Participant's Prepregnancy Weight

This value will be for the participant's weight in the nearest quarter pounds immediately prior to pregnancy. This item may be supplied instead of pre-pregnancy weight in grams.

8.27.1.57.1 Origin of Data Element

This value is not available, field will be left blank.

8.27.1.57.2 Format

The value will print as a single character string, column position 256.

8.27.1.58 Participant's Prepregnancy Weight in Grams

This value will be for the participant's weight in grams that applies to the reporting certification. This item may be supplied instead of prepregnancy weight in pounds.

8.27.1.58.1 Origin of Data Element

The value is not available, field will be left blank.

8.27.1.58.2 Format

The value will print as a 6 character string, left justified with trailing spaces, column position 257-262.

8.27.1.59 Weight Gain during Pregnancy in Pounds

This value will be for the participant's weight gain during pregnancy in whole pounds. This item may be supplied instead of weight gain in grams.

8.27.1.59.1 Origin of Data Element

The value will be taken from the WEIGHTGAINED attribute of the PREGNANCY entity.

8.27.1.59.2 Format

The value will print as a 2 character string, left justified with trailing spaces, column position 263-264.

8.27.1.60 The Nearest Quarter Pound of Participant's Weight Gain during Pregnancy

This value will be for the participant's weight in the nearest quarter pounds during pregnancy. This item may be supplied instead of weight gain in grams.

8.27.1.60.1 Origin of Data Element

This value is not available, field will be left blank.

8.27.1.60.2 Format

The value will print as a single character string, column position 265.

8.27.1.61 Participant's Weight Gain during Pregnancy in Grams

This value will be for the participant's weight gain during pregnancy in grams. This item may be supplied instead of weight gain in pounds.

8.27.1.61.1 Origin of Data Element

The value is not available, field will be left blank.

8.27.1.61.2 Format

The value will print as a 5 character string, left justified with trailing spaces, column position 266-270.

8.27.1.62 Baby's Weight in Pounds

This value will be the infant's or child's weight in whole pounds. This item may be supplied instead of baby's weight in grams.

8.27.1.62.1 Origin of Data Element

The value will be taken from the WEIGHTPOUNDS attribute of the CHILD entity.

8.27.1.62.2 Format

The value will print as a 2 character string, left justified with trailing spaces, column position 271-272.

8.27.1.63 Ounces of Birth Weight

This value will be for the infant's or child's weight in ounces. This item may be supplied instead of baby's weight in grams.

8.27.1.63.1 Origin of Data Element

The value will be taken from the WEIGHTOUNCES attribute of the CHILD entity.

8.27.1.63.2 Format

The value will print as a 2 character string, left justified with trailing spaces, column position 273-274.

8.27.1.64 Baby's Birth Weight in Grams

This value will be for the infant's or child's birth weight in grams. This item may be supplied instead of baby's weight in pounds.

8.27.1.64.1 Origin of Data Element

The value is not available, field will be left blank.

8.27.1.64.2 Format

The value will print as a 4 character string, left justified with trailing spaces, column position 275-278.

8.27.1.65 Baby's Length at Birth in Inches

This value will be for the infant's or child's length at birth in whole inches. This item may be supplied instead of length in centimeters.

8.27.1.65.1 Origin of Data Element

The value will be taken from the LENGTHINCHES attribute of the CHILD entity.

8.27.1.65.2 Format

The value will print as a 2 character string, left justified with trailing spaces, column position 279-280.

8.27.1.66 The Nearest Eight of an Inch of Baby's Length at Birth

This value will be for the infant's or child's length at birth in the nearest eight of an inch. This item may be supplied instead of length in centimeters.

8.27.1.66.1 Origin of Data Element

The value will be taken from the LENGTHEIGHTHS attribute of the CHILD entity.

8.27.1.66.2 Format

The value will print as a single character string, column position 281.

8.27.1.67 Participant's Height in Centimeters

This value will be for the infant's or child's length at birth in centimeters. This item may be supplied instead of baby's length in inches.

8.27.1.67.1 Origin of Data Element

The value is not available, field will be left blank.

8.27.1.67.2 Format

The value will print as a 3 character string, left justified with trailing spaces, column position 282-284.

8.27.1.68 Date of Last Routine Checkup or Immunization

This value has been deleted.

8.27.1.68.1 Origin of Data Element

Leave columns blank.

8.27.1.68.2 Format

The value will print as an 8 character string, column position 285-292.

8.27.1.69 Length of Time Mother in WIC

This value has been deleted.

8.27.1.69.1 Origin of Data Element

Leave columns blank.

8.27.1.69.2 Format

The value will print as a 2 character string, column position 293-294.

8.27.1.70 Erythrocyte Protoporphyrin Test Results

This value has been deleted.

8.27.1.70.1 Origin of Data Element

Leave columns blank.

8.27.1.70.2 Format

The value will print as a 3 character string, column position 295-297.

8.27.1.71 Participation in the Food Distribution on Indian Reservations Program

Does the participant receive Food Distribution on Indian Reservations benefits?

8.27.1.71.1 Origin of Data Element

The value is not available, converted to a corresponding numeric value = 2.

- 1 = Yes (Y)
- 2 = No (N)

8.27.1.71.2 Format

The value will print as a single character string, column position 298.

8.27.1.72 Date of Blood Test

This value will be the date at which the participant's blood measurement was taken.

8.27.1.72.1 Origin of Data Element

The value will be taken from the RESULTDATE attribute of the BLOODWORK entity.

8.27.1.72.2 Format

The value will print as an 8 character string, in the "MMDDYYYY" format, column position 299-306.

8.27.1.73 Race/Ethnicity using OMB's New Coding Scheme for PC2006 (Optional)

This value is to be the ethnicity and race using OMB's New Coding Scheme.

8.27.1.73.1 Origin of Data Element

The value is not available, field will be left blank.

8.27.1.73.2 Format

The value will print as a 6 character string, column position 307-312.

8.28 Generate Food Instrument Redemption Report Dialog

The Generate Food Instrument Redemption Report dialog allows the user to generate a report of the different food instrument types that where issued and redeemed in the time period. It is invoked when the user selects the Food Instrument Redemption Report list item from the Generate Reports dialog.
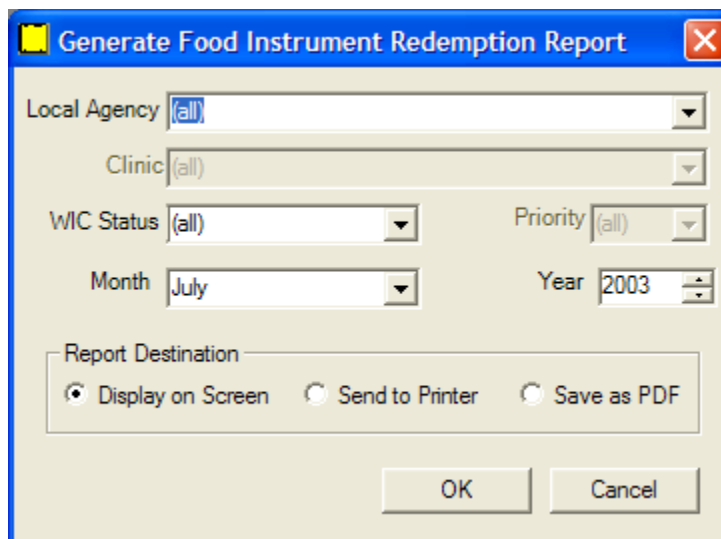
Figure 16– Generate Food Instrument Redemption Report Dialog

8.28.1 Controls

This section describes the behavior of the controls on the Generate Food Instrument Redemption Report selection dialog.

8.28.1.1 Agency Dropdown

This list will display all Agencies in the state. The user will be able to subset the list by selecting one clinic or all clinics. The dropdown will be enabled when the Generate Food Instrument Redemption Report dialog is active. The characteristics for this field are defined in *Consistencies*.

8.28.1.2 Clinic Dropdown

This list will display all Clinics associated with the selected clinic. The user will be able to subset the list by selecting one Clinic or all Clinics. The dropdown will be enabled when the Generate Food Instrument Redemption Report dialog is active and a selection is made in the Clinic dropdown. It will display all Clinics listed in the Clinic entity associated with the selected clinic in numeric order by Clinic ID. This list will include a value of '(all)'. This control is initially blank. If a selection is made in this control, upon a change to the Clinic this attribute will be emptied. Upon selecting '(all)' in the Clinic dropdown this attribute will be emptied and disabled. When enabled, this control initially defaults to '(all)'.

8.28.1.3 WIC Category Dropdown

This list will display all WIC Categories. The user will be able to subset the list by selecting one or all WIC Categories. The dropdown will be enabled when the Generate Food Instrument Redemption Report dialog is active. It will display all WIC Categories listed in the WIC Category entity in alphabetical order. This list will include a value of '(all)'. This control initially defaults to '(all)'.

8.28.1.4 Priority Dropdown

This list will display all priorities associated with the selected WIC Category. The user will be able to subset the list by selecting one priority or all priorities. The dropdown will be enabled when the Generate Food Instrument Redemption Report dialog is active and a selection is made in the WIC Category attribute. The list will display all priorities associated with the selected WIC Category as defined in the Priority_Per_WIC_Status entity in numeric order. This list will include a value of '(all)'. This control initially defaults to '(all)'. If the WIC Category is changed, the Priority attribute will be changed to a value of '(all)'. If 'all' is selected in the WIC Category attribute, this attribute is disabled.

8.28.1.5 Month Dropdown

This control allows the user to select the month to include in the report. The dropdown will be enabled when the Generate Food Instrument Redemption Report dialog is active. This will be a read only drop down list. It is filled with a list of months from the Reference Dictionary Entity, which is displayed in calendar month order within the list. It will default to the current month as defined by the Current_Month_End_Date attribute in the Process_Control entity.

A selection is required.

8.28.1.6 Year Spin Control

This control allows the user to select the year to report. The dropdown will be enabled when the Generate Food Instrument Redemption Report dialog is active. The masked edit box will only allow the entry of numeric digits. The maximum size of the control will be four (4) digits. The masked edit box will default to the current system year. Selection of the increment or decrement buttons of the spin control will increase or decrease the value by one (1). The spin control will have an upper limit of the current system year and a lower limit of 1900.

An entry is required for this control.

8.28.1.7 Report Destination Radio Button

This control allows the user to select either Display on Screen, Send to Printer or Save as PDF. The control will be enabled when the dialog is enabled. It will default to Display on Screen.

8.28.1.8 OK Button

This control allows the user to instruct the system to produce the Food Instrument Redemption Report. The OK button will be enabled when the Generate Food Instrument Redemption Report dialog. (See *Saving the Data* in the Processing section below). Characteristics for the OK button are defined in *Consistencies*.

8.28.1.9 Cancel Button

This control allows the user to exit the Generate Food Instrument Redemption Report dialog without producing the report. The Cancel button will be enabled when the Generate Food Instrument Redemption Report dialog is active. It will be the cancel button for the dialog. Characteristics for the Cancel button are defined in *Consistencies*.

8.28.2 Processes

This section describes the processes (navigation) that take place as a result of the actions taken on the Generate Food Instrument Redemption dialog.

8.28.2.1 Initializing the Interface

Upon initial presentation of the dialog:

- The title bar text will be set to "Generate Food Instrument Redemption Report"
- The Clinic dropdown will default to 'all'.
- The Clinic dropdown will default to 'all'
- The WIC Category will default to 'all'
- The Priority will default to 'all'
- The Month dropdown will default to the current month as defined by the Current_Month_End_Date attribute in the Process_Control table.
- The Year masked edit box will default to the current system year.
- The Report Destination will default to Display on Screen radio button.

8.28.2.2 Edits

Upon selection of the OK button:

- o If a selection is not made in the following:
- o Clinic dropdown
- o Clinic dropdown
- o WIC Category dropdown
- o Priority dropdown

    o Month dropdown

the system will invoke a standard error message with the text "A selection is required in the <name of control>."

- If an entry is not made in the Year masked edit box, the system will invoke a standard error message with the text "An entry required for the <name of control>."
- Month and Year combined values are validated:
  - The value entered in the Year masked edit box must be between 1900 and the current system year or the system will invoke a standard error message with the text "The Year must be between 1900 and the current system year."
  - If the year entered is within the current system year and the month selected is greater than the current system month, the system will invoke a standard error message with the text, "Month and year entered must be less than or equal to current month and year."

8.28.2.3 Generate Food Instrument Redemption Report

Upon successful completion of the edits listed above, the system will generate the Food Instrument Redemption Report to the selected report destination:

- If Report Destination is Screen, the system will display the report on the screen.
- If Report Destination is Printer, the system will generate the report and send it to the selected other output printer (see *System Tools*).
- If Report Destination is PDF, the system will invoke the "Save As" dialog. The user can select the folder and enter the file name, or cancel. Upon entering a file name and selecting Save, the system will save the file to the selected folder.

8.28.2.4 Cancel

Upon selection of the Cancel button, the system will dismiss the Generate Food Instrument Redemption Report dialog without producing the report and return the user to the Generate Reports dialog.

8.29 Food Instrument Redemption Report (Output) OPR027

Food instruments are issued and redeemed each month, but the rate of redemption changes over time. The Food Instrument Redemption Report tracks these changes. The amount of information on the report will depend on the options selected on the Generate Food Instrument Redemption Report Dialog.

Food Instrument Redemption

```
OPR027
                                    STATE DEPARTMENT OF HEALTH                    RUN DATE XX/XX/XXXX
                                    FOOD INSTRUMENT REDEMPTION                    RUN TIME HH:MM:SS
                                    MONTH OF X X X X X X X X                      PAGE:    XXX
CLINIC  XX                  X_X_X_X_X_X_X_XCLINIC_DESCRIPTIONX_X_X_X_X_X_X_X_X

WIC CATEGORY  X

            NUMBER   PERCENT   NUMBER   PERCENT    AMOUNT     PERCENT
FITYPE      ISSUED   ISSUED   REDEEMED REDEEMED   REDEEMED   ISSUED/REDEEMED
_____

XXXXX       XXX,XXX   XXX.XX   XXX,XXX   XXX.XX   $X,XXX,XXX   XXX.XX
XXXXX       XXX,XXX   XXX.XX   XXX,XXX   XXX.XX   $X,XXX,XXX   XXX.XX
XXXXX       XXX,XXX   XXX.XX   XXX,XXX   XXX.XX   $X,XXX,XXX   XXX.XX
XXXXX       XXX,XXX   XXX.XX   XXX,XXX   XXX.XX   $X,XXX,XXX   XXX.XX
XXXXX       XXX,XXX   XXX.XX   XXX,XXX   XXX.XX   $X,XXX,XXX   XXX.XX
XXXXX       XXX,XXX   XXX.XX   XXX,XXX   XXX.XX   $X,XXX,XXX   XXX.XX
XXXXX       XXX,XXX   XXX.XX   XXX,XXX   XXX.XX   $X,XXX,XXX   XXX.XX


        1         2         3         4         5         6         7         8         9         0         1         2
123456789012345678901234567890123456789012345678901234567890123456789012345678901234567890123456789012345678901234567890123456789012
```

Food Instrument Redemption

```
OPR027
                                   STATE DEPARTMENT OF HEALTH                    RUN DATE XX/XX/XXXX
                                   FOOD INSTRUMENT REDEMPTION                    RUN TIME HH:MM:SS
                                   MONTH OF X X X X X X X X                      PAGE:    XXX
                                      PAID WITHOUT ISSUANCE

              NUMBER   PERCENT   NUMBER    PERCENT     AMOUNT     PERCENT
FITYPE        ISSUED   ISSUED   REDEEMED  REDEEMED    REDEEMED   ISSUED/REDEEMED
_____

              XXX,XXX   XXX.XX   XXX,XXX   XXX.XX   $X,XXX,XXX    XXX.XX


        1         2         3         4         5         6         7         8         9         0         1         2
123456789012345678901234567890123456789012345678901234567890123456789012345678901234567890123456789012345678901234567890123456789012
```

Food Instrument Redemption

```
OPR027
                                        STATE DEPARTMENT OF HEALTH              RUN DATE XX/XX/XXXX
                                        FOOD INSTRUMENT REDEMPTION             RUN TIME HH:MM:SS
                                        MONTH OF X_X_X_X_X_X_X_X               PAGE:    XXX
                                                REPORT TOTAL

             NUMBER   PERCENT   NUMBER    PERCENT     AMOUNT    PERCENT
FITYPE       ISSUED   ISSUED   REDEEMED  REDEEMED    REDEEMED  ISSUED/REDEEMED

XXXXX       XXX,XXX   XXX.XX   XXX,XXX    XXX.XX   $X,XXX,XXX   XXX.XX
XXXXX       XXX,XXX   XXX.XX   XXX,XXX    XXX.XX   $X,XXX,XXX   XXX.XX
XXXXX       XXX,XXX   XXX.XX   XXX,XXX    XXX.XX   $X,XXX,XXX   XXX.XX
XXXXX       XXX,XXX   XXX.XX   XXX,XXX    XXX.XX   $X,XXX,XXX   XXX.XX
XXXXX       XXX,XXX   XXX.XX   XXX,XXX    XXX.XX   $X,XXX,XXX   XXX.XX
XXXXX       XXX,XXX   XXX.XX   XXX,XXX    XXX.XX   $X,XXX,XXX   XXX.XX
XXXXX       XXX,XXX   XXX.XX   XXX,XXX    XXX.XX   $X,XXX,XXX   XXX.XX


        1         2         3         4         5         6         7         8         9         0         1         2
123456789012345678901234567890123456789012345678901234567890123456789012345678901234567890123456789012345678901234567890123456789012
```

8.29.1 Data Elements

8.29.1.1 FITYPE

8.29.1.1.1 Origin of Data Element

The food instrument type value is the code associated with the combination of distribution items and quantities on the food instrument. All food instrument types issued for the reported month are listed.

8.29.1.1.2 Format

This is a five-character value.

8.29.1.2 Number Issued

8.29.1.2.1 Origin of Data Element

This value is the count of the total number of food instruments where the Participation_Date attribute of the Food_Instrument_Set entity is within the reported month. Values are totaled for each food instrument type.

8.29.1.2.2 Format

This value is a six-digit number.

8.29.1.3 Percent Issued

8.29.1.3.1 Origin of Data Element

This attribute is calculated by dividing the number issued (line total) by the total issued for this report. The selection criteria for the report may vary.

8.29.1.3.2 Format

This value is a three-digit number plus two decimal places.

8.29.1.4 Number Redeemed

8.29.1.4.1 Origin of Data Element

This value is the count of the total number of food instruments where the Participation_Date attribute of the Food_Instrument_Set entity is within the reported month and the food instrument has been paid. Values are totaled for each food instrument type.

8.29.1.4.2 Format

This value is a six-digit number.

8.29.1.5 Percent Redeemed

8.29.1.5.1 Origin of Data Element

This attribute is calculated by dividing the number redeemed (line total) by the total redeemed for this report. The selection criteria for the report may vary.

8.29.1.5.2 Format

This value is a three-digit number plus two decimal places.

8.29.1.6 Amount Redeemed

8.29.1.6.1 Origin of Data Element

This value is the summary of the Paid_Amount attribute on the Food_Instrument entity for food instruments where one of the following selection criteria is met. Values are totaled for each food instrument type.

- The Participation_Date attribute of the Food_Instrument_Set entity is the same as the reported month and the Paid_Date attribute of the Food_Instrument entity is valued.
- The Participation_Date attribute of the Food_Instrument_Set entity is zero and the Paid_Date attribute of the Food_Instrument entity is during the reported month.

8.29.1.6.2 Format

This value is an eight-digit number plus two decimal places.

8.29.1.7 Percent Issued/Redeemed

8.29.1.7.1 Origin of Data Element

This attribute is calculated by dividing the Number Redeemed (line total) divided by the Number Issued (line total).

8.29.1.7.2 Format

This value is a three-digit number plus two decimal places.

8.29.2 Filter Criteria

8.29.2.1 Base of Data

The report is based on food instruments that were issued for the reported month.

8.29.2.1.1 Clinic, Clinic

If all agencies are selected, data for each individual clinic will be listed separately.

If an individual clinic and all Clinics are selected, individual Clinic data for that clinic will be listed separately. In this situation, totals for the selected clinic will not be printed.

If an individual clinic and individual Clinic are selected, the data for the selected clinic/Clinic will be listed. In this situation, totals for the selected clinic will not be printed.

8.29.2.1.2 Category, Priority

If all category values are selected, data for each category will be listed separately.

If an individual category and all priorities are selected, individual priority data for that category will be listed separately. In this situation, totals for the individual category will not be printed.

If an individual category and individual priority are selected, the data for the selected category /priority will be listed. In this situation, totals for the individual category will not be printed.

8.29.2.1.3 Paid Without Issuance

For every report, regardless of selection criteria, a state summary of paid without issuance is printed. Paid without issuance are food instruments within the reported month that have a Paid_Date value within the reported month and do not have a value in the Participation_Date attribute of the Food_Instrument entity.

8.29.2.1.4 State Totals

For every report, regardless of selection criteria, a state summary is printed. This is a summary of all agencies and paid without issuance.

8.29.2.2 Sort Order

This report will be sorted by clinic, Clinic, category, priority, and food instrument type, depending on selection criteria of the report.

8.29.2.2.1 Clinic, Clinic

If more than one clinic is selected, the report will be sorted by clinic code. If more than one Clinic is selected, the report will be sorted by clinic code then Clinic code.

8.29.2.2.2 Category, Priority

If more than one category is selected, the report will be sorted by clinic code then Clinic code then category. If more than one priority is selected, the report will be sorted by priority code within category code.

8.29.2.2.3 FI Type

The report will be sorted by food instrument type, regardless of the other report selection criteria.

8.29.2.3 Control Breaks

8.29.2.3.1 Clinic Identifier

On a change of clinic identifier a page break will occur.

8.29.2.3.2 Clinic Identifier

On a change of Clinic identifier a page break will occur.

8.29.2.3.3 WIC Category

On a change of WIC Category a page break will occur.

8.29.2.3.4 Priority

On a change of priority a page break will occur.

8.29.2.4 Grand Total

The totals for all clinics will be printed as Report totals.

8.29.3 Frequency and Distribution

Frequency   - On demand

Data current as of   - Date of run

8.30 Generate Formula Usage Report Dialog

The Generate Formula Usage Report dialog allows the user to generate a report of the different formulas that where issued and redeemed in the time period. It is invoked when the user selects the Food Instrument Redemption Report list item from the Generate Reports dialog.

Figure 17– Generate Formula Usage Report Dialog

8.30.1 Controls

This section describes the behavior of the controls on the Generate Formula Usage Report dialog.

8.30.1.1 Agency Dropdown

This will have all the clinics in the state. The user will be able to subset the list by a clinic or select it all clinics. The dropdown will be enabled when the Generate Formula Usage Report dialog is active. The characteristics for this field are defined in *Consistencies*.

8.30.1.2 Clinic Dropdown

This control allows the user to select a Clinic to run the report against. The dropdown will be enabled when the Generate Formula Usage Report dialog is active and a selection is made in the Clinic dropdown. It will display all Clinics listed in the Clinic entity associated with the selected clinic in numeric order by Clinic ID. This list will include a value of '(all)'. This control is initially blank. If a selection is made in this control, upon a change to the Clinic this attribute will be emptied. Upon selecting '(all)' in the Clinic dropdown this attribute will be emptied and disabled. If no selection is made in this attribute, the report will include all Clinics.

8.30.1.3 WIC Category Dropdown

This control allows the user to select the WIC Category to run the report against. The dropdown will be enabled when the Generate Formula Usage Report dialog is active. It will display all WIC Categories listed in the WIC Category entity in alphabetical order. This list will include a value of '(all)'. This control is initially blank. If no selection is made in this attribute, the report will include all WIC Categories.

8.30.1.4 Formula Dropdown

This control allows the user to select the formula to run the report against. The dropdown will be enabled when the Generate Formula Usage Report dialog is active. The list will display all distribution items with the food category 'formula' listed in the FoodDistributionItem entity in alphabetical order. This list will include a value of '(all)'. This control is initially blank. This control is initially blank. If no selection is made in this attribute, the report will include all formulas.

8.30.1.5 Details Check Box

This control allows the user to select to include the detail information of each Participant who was issued formula food instruments. The check box will be enabled when the Generate Formula Usage Report dialog is active. This control is initially un-checked.

8.30.1.6 Month Dropdown

This control allows the user to select the month to include in the report. The dropdown will be enabled when the Generate Formula Usage Report dialog is active. This will be a read only drop down list. It is filled with a list of months from the Reference Dictionary Entity, which is displayed in calendar month order within the list. It will default to the current month as defined by the Current_Month_End_Date attribute in the Process_Control entity.

A selection is required.

8.30.1.7 Year Spin Control

This control allows the user to select the year to run the report against. The dropdown will be enabled when the Generate Formula Usage Report dialog is active. The masked edit box will only allow the entry of numeric digits. The maximum size of the control will be four (4) digits. The masked edit box will default to the current system year. Selection of the increment or decrement buttons of the spin control will increase or decrease the value by one (1). The spin control will have an upper limit of the current system year and a lower limit of 1900.

An entry is required for this control.

8.30.1.8 Report Destination Radio Button

This control allows the user to select either Display on Screen, Send to Printer or Save as PDF. The control will be enabled when the dialog is enabled. It will default to Display on Screen.

8.30.1.9 OK Button

This control allows the user to instruct the system to generate the Formula Usage Report. The OK button will be enabled when the Generate Formula Usage Report dialog. (See *Saving the Data* in the Processing section below). Characteristics for the OK button are defined in *Consistencies*.

8.30.1.10 Cancel Button

This control allows the user to exit the Generate Formula Usage Report dialog without producing the report. The Cancel button will be enabled when the Generate Formula Usage Report dialog is active. Characteristics for the Cancel button are defined in *Consistencies*.

8.30.2 Processes

This section describes the processes (navigation) that take place as a result of the actions taken on the Generate Formula Usage Report dialog.

8.30.2.1 Initializing the Interface

Upon initial presentation of the dialog:

- The title bar text will be set to "Generate Formula Usage Report"
- The Clinic dropdown will default to 'all'.
- The Clinic dropdown will default to 'all'
- The WIC Category will default to 'all'
- The Formula will be initially blank.
- The Show Details check box will be initially blank
- The Month dropdown will default to the current month as defined by the Current_Month_End_Date attribute in the Process_Control table.
- The Year masked edit box will default to the current system year.

- The Report Destination will default to Display on Screen radio button.

8.30.2.2 Edits

Upon selection of the OK button:

- If a selection is not made in the following:
  - o Clinic dropdown
  - o Clinic dropdown
  - o WIC Category dropdown
  - o Priority dropdown
  - o Month dropdown

  the system will invoke a standard error message with the text "A selection is required in the <name of control>."

- If an entry is not made in the Year masked edit box, the system will invoke a standard error message with the text "An entry required for the <name of control>."
- Month and Year combined values are validated:
  - o The value entered in the Year masked edit box must be between 1900 and the current system year or the system will invoke a standard error message with the text "The Year must be between 1900 and the current system year."
  - o If the year entered is within the current system year and the month selected is greater than the current system month, the system will invoke a standard error message with the text, "Month and year entered must be less than or equal to current month and year."

8.30.2.3 Generate Formula Usage Report

Upon successful completion of the edits listed above, the system will generate the Formula Usage Report to the selected report destination:

- If Report Destination is Screen, the system will display the report on the screen.
- If Report Destination is Printer, the system will generate the report and send it to the selected other output printer (see *System Tools*).
- If Report Destination is PDF, the system will invoke the "Save As" dialog. The user can select the folder and enter the file name, or cancel. Upon entering a file name and selecting Save, the system will save the file to the selected folder.

8.30.2.4 Cancel

Upon selection of the Cancel button, the system will dismiss the Generate Formula Usage Report dialog without producing the report and return the user to the Generate Reports dialog.

8.31 Formula Usage Report (Output) OPR028

The Formula Usage Report is generated to show how formula is being used through out the state. The amount of information on the report will depend on the options selected on the Generate Formula Usage Report Dialog. The report may be selected at a summary level or detail level.

Formula Usage Report (No Detail)

```
OPR028
                              STATE DEPARTMENT OF HEALTH                      RUN DATE XX/XX/XXXX
                              FOOD INSTRUMENT REDEMPTION                      RUN TIME HH:MM:SS
                              MONTH OF X_X_X_X_X_X_X_X                        PAGE:      XXX
CLINIC  XX               X_X_X_X_X_X_X_XCLINIC_DESCRIPTIONX_X_X_X_X_X_X_X

WIC CATEGORY   X

                                       NUMBER    PARTICIPANTS   NUMBER    PARTICIPANTS   AVERAGE    PERCENT
FITYPE FORMULA DESCRIPTION             ISSUED    ISSUED         REDEEMED  REDEEMED       COST       REDEEMED

XXXXX  XXXXXXXXXXXXXXXXXXXXXXXXXXXXXX   XXX,XXX   XXX,XXX        XXX,XXX   XXX,XXX        $XXX.XX    XXX.XX
XXXXX  XXXXXXXXXXXXXXXXXXXXXXXXXXXXXX   XXX,XXX   XXX,XXX        XXX,XXX   XXX,XXX        $XXX.XX    XXX.XX
XXXXX  XXXXXXXXXXXXXXXXXXXXXXXXXXXXXX   XXX,XXX   XXX,XXX        XXX,XXX   XXX,XXX        $XXX.XX    XXX.XX
XXXXX  XXXXXXXXXXXXXXXXXXXXXXXXXXXXXX   XXX,XXX   XXX,XXX        XXX,XXX   XXX,XXX        $XXX.XX    XXX.XX
XXXXX  XXXXXXXXXXXXXXXXXXXXXXXXXXXXXX   XXX,XXX   XXX,XXX        XXX,XXX   XXX,XXX        $XXX.XX    XXX.XX
XXXXX  XXXXXXXXXXXXXXXXXXXXXXXXXXXXXX   XXX,XXX   XXX,XXX        XXX,XXX   XXX,XXX        $XXX.XX    XXX.XX
XXXXX  XXXXXXXXXXXXXXXXXXXXXXXXXXXXXX   XXX,XXX   XXX,XXX        XXX,XXX   XXX,XXX        $XXX.XX    XXX.XX


          1         2         3         4         5         6         7         8         9         0         1         2
 123456789012345678901234567890123456789012345678901234567890123456789012345678901234567890123456789012345678901234567890123456789012
```

Formula Usage Report (Detail)

```
OPR028
                              STATE DEPARTMENT OF HEALTH                        RUN DATE XX/XX/XXXX
                              FOOD INSTRUMENT REDEMPTION                        RUN TIME HH:MM:SS
                              MONTH OF X_X_X_X_X_X_X                            PAGE:    XXX
CLINIC  XX                  X_X_X_X_X_X_X_XCLINIC_DESCRIPTIONX_X_X_X_X_X_X_X_X

WIC CATEGORY   X

                                          NUMBER    PARTICIPANTS   NUMBER     PARTICIPANTS   AVERAGE    PERCENT
FITYPE FORMULA DESCRIPTION                ISSUED      ISSUED      REDEEMED      REDEEMED      COST      REDEEMED
_____

XXXXX  XXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXX    XXX,XXX    XXX,XXX      XXX,XXX      XXX,XXX     $XXX.XX     XXX.XX

               XXXXXXXXXXXXXXXXXXXX X XXXXXXXXXXXXXXXXXXXXXXXXX
               XXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXX
               XXXXXXXXXXXXXXXXXXXXXXXXXXXXXX, XX  XXXXX-XXXX

               XXXXXXXXXXXXXXXXXXXX X XXXXXXXXXXXXXXXXXXXXXXXXX
               XXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXX
               XXXXXXXXXXXXXXXXXXXXXXXXXXXXXX, XX  XXXXX-XXXX

               XXXXXXXXXXXXXXXXXXXX X XXXXXXXXXXXXXXXXXXXXXXXXX
               XXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXX
               XXXXXXXXXXXXXXXXXXXXXXXXXXXXXX, XX  XXXXX-XXXX

XXXXX  XXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXX    XXX,XXX    XXX,XXX      XXX,XXX      XXX,XXX     $XXX.XX     XXX.XX

               XXXXXXXXXXXXXXXXXXXX X XXXXXXXXXXXXXXXXXXXXXXXXX
               XXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXX
               XXXXXXXXXXXXXXXXXXXXXXXXXXXXXX, XX  XXXXX-XXXX

               XXXXXXXXXXXXXXXXXXXX X XXXXXXXXXXXXXXXXXXXXXXXXX
               XXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXX
               XXXXXXXXXXXXXXXXXXXXXXXXXXXXXX, XX  XXXXX-XXXX


         1         2         3         4         5         6         7         8         9         0         1         2
123456789012345678901234567890123456789012345678901234567890123456789012345678901234567890123456789012345678901234567890012
```

8.31.1 Data Elements

8.31.1.1 FITYPE

8.31.1.1.1 Origin of Data Element

The food instrument type value is the code associated with the combination of distribution items and quantities on the food instrument. All food instrument types issued with formula for the reported month are listed. To determine if a food instrument was issued with formula, the Distribution_Item_ID attribute of the FoodInstrumentTypeItems entity is joined with the Distribution_Item_ID attribute of the Food_Dist_Category entity. All food instruments in the reported month with a Base_Food_Category_ID value of 'A' are included.

8.31.1.1.2 Format

This is a five-character value.

8.31.1.2 Formula Description

8.31.1.2.1 Origin of Data Element

This value is the description of the formula item. The Distribution_Item_ID attribute of the FoodInstrumentTypeItems entity is used to get the Description attribute of the Food_Distribution_Item entity.

8.31.1.2.2 Format

This is a 120 character value.

8.31.1.3 Number Issued

8.31.1.3.1 Origin of Data Element

This value is the count of the total number of food instruments with formula where the Participation_Date attribute of the Food_Instrument_Set entity is within the reported month.

8.31.1.3.2 Format

This value is a six-digit number.

8.31.1.4 Participants Issued

8.31.1.4.1 Origin of Data Element

This attribute is a count of participants that were issued the FI Type with formula for the reported month. If a participant is issued more than one of the same FI Type they will only be counted one time.

8.31.1.4.2 Format

This value is a six-digit number.

8.31.1.5 Number Redeemed

8.31.1.5.1 Origin of Data Element

This value is the count of the total number of food instruments with formula where the Participation_Date attribute of the Food_Instrument_Set entity is within the reported month and the food instrument has been paid.

8.31.1.5.2 Format

This value is a six-digit number.

8.31.1.6 Participants Redeemed

8.31.1.6.1 Origin of Data Element

This attribute is a count of participants that were issued the FI Type with formula for the reported month and also had at least one of those food instruments redeemed. Participants are counted only once per FI Type.

8.31.1.6.2 Format

This value is a six-digit number.

8.31.1.7 Average Cost

This is the average dollar amount of the FI Type that has been redeemed.

8.31.1.7.1 Origin of Data Element

This value is calculated by getting the count of food instruments and the sum of the paid amount for the food instruments with formula where the Participation_Date attribute of the Food_Instrument_Set entity is within the reported month and the food instrument has been paid. The sum of the paid amount is divided by the count.

8.31.1.7.2 Format

This value is a five-digit number plus two decimal places.

8.31.1.8 Percent Redeemed

8.31.1.8.1 Origin of Data Element

This attribute is calculated by dividing the Number Redeemed (line total) divided by the Number Issued (line total).

8.31.1.8.2 Format

This value is a three-digit number plus two decimal places.

8.31.1.9 First Name (Detail report only)

This is the first name of the participant who was issued the FI Type.

8.31.1.9.1 Origin of Data Element

This value is the First_Name attribute of the Member entity.

8.31.1.9.2 Format

This is a twenty-character value.

8.31.1.10 Middle Initial (Detail report only)

This is the middle initial of the participant who was issued the FI Type.

8.31.1.10.1 Origin of Data Element

This value is the Middle_Initial attribute of the Member entity.

8.31.1.10.2 Format

This is a one-character value.

8.31.1.11 Last Name (Detail report only)

This is the last name of the participant who was issued the FI Type.

8.31.1.11.1 Origin of Data Element

This value is the Last_Name attribute of the Member entity.

8.31.1.11.2 Format

This is a twenty-five-character value.

8.31.1.12 Address (Detail report only)

This is the address of the participant who was issued the food instrument with the reported FI Type.

8.31.1.12.1 Origin of Data Element

This value is the Address attribute of the Household entity.

8.31.1.12.2 Format

This is a fifty-character value.

8.31.1.13 City, State, Zip (Detail report only)

This is the city, state and zip code of the participant who was issued the food instrument with the reported FI Type.

8.31.1.13.1 Origin of Data Element

These values are the Local_Municipality and Zip attributes of the Household entity. The state code value will come from the Registry. These values are concatenated in city, state and zip code sequence.

8.31.1.13.2 Format

This is a fifty-character value.

8.31.2 Filter Criteria

8.31.2.1 Base of Data

The report is based on formula food instruments that were issued for the reported month. Formula food instruments have items with a base food category value of 'A'.

8.31.2.1.1 Clinic, Clinic

If all agencies are selected, data for each individual clinic will be listed separately.

If an individual clinic and all Clinics are selected, individual Clinic data for that clinic will be listed separately.

If an individual clinic and individual Clinic are selected, the data for the selected clinic/Clinic will be listed.

8.31.2.1.2 Category

If all category values are selected, data for each category will be listed separately.

If an individual category is selected, data for that category will be listed.

8.31.2.1.3 Formula

If all formula items are selected, data for each formula item will be included.

If an individual formula item is selected, only data for that formula item will be included.

8.31.2.2 Sort Order

This report will be sorted by clinic, Clinic, category, formula, and food instrument type, depending on selection criteria of the report.

8.31.2.2.1 Clinic, Clinic

If more than one clinic is selected, the report will be sorted by clinic code. If more than one Clinic is selected, the report will be sorted by clinic code then Clinic code.

8.31.2.2.2 Category

If more than one category is selected, the report will be sorted by clinic code then Clinic code then category.

8.31.2.2.3 Formula

If more than one formula item is selected, the report will be sorted by formula description.

8.31.2.2.4 FI Type

The report will be sorted by food instrument type, regardless of the other report selection criteria.

8.31.2.2.5 Name (Detail report only)

The detail report will be sorted by last name, first name, middle initial and State WICID.

8.31.2.3 Control Breaks

8.31.2.3.1 Clinic Identifier

On a change of clinic identifier a page break will occur.

8.31.2.3.2 Clinic Identifier

On a change of Clinic identifier a page break will occur.

8.31.2.3.3 WIC Category

On a change of WIC Category a page break will occur.

8.31.2.3.4 Formula

On a change of formula a page break will occur.

8.31.2.4 Grand Total

No state totals have been defined for this report.

8.31.3 Frequency and Distribution

Frequency   - On demand

Data current as of   - Date of run

8.32 Generate Income Eligibility Report Dialog

The Generate Income Eligibility Report dialog allows the user to generate a report of the percentage of income levels of the participants for the current system month, day and year. It is invoked when the user selects the Food Instrument Redemption Report list item from the Generate Reports dialog.
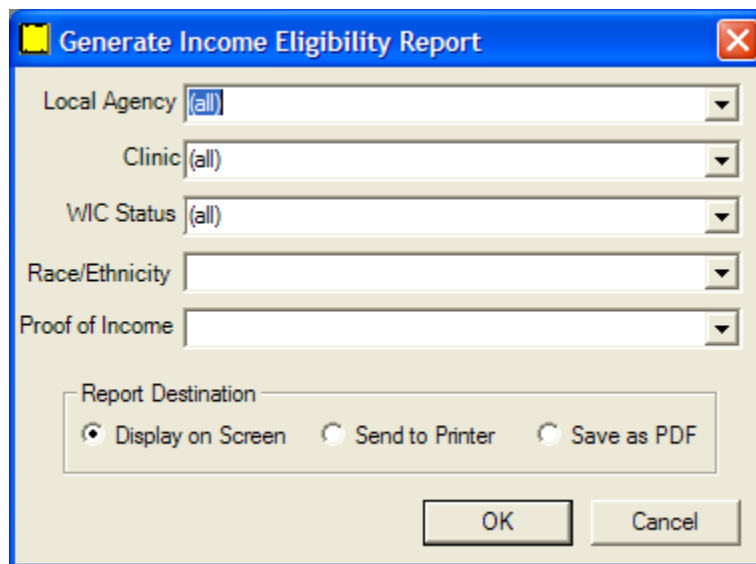

Figure 18– Generate Income Eligibility Report Dialog

8.32.1 Controls

This section describes the behavior of the controls on the Generate Income Eligibility Report dialog.

8.32.1.1 Agency Dropdown

This will have all the clinics in the state. The user will be able to subset the list by a clinic or select all clinics. The dropdown will be enabled when the Generate Income Eligibility Report dialog is active. The characteristics for this field are defined in *Consistencies*.

8.32.1.2 Clinic Dropdown

This control allows the user to select a Clinic to run the report against. The dropdown will be enabled when the Generate Income Eligibility Report dialog is active and a selection is made in the Clinic dropdown. It will display all Clinics listed in the Clinic entity associated with the selected clinic in numeric order by Clinic ID. This list will include a value of '(all)'. This control is initially blank. If a selection is made in this control, upon a change to the Clinic this attribute will be emptied. Upon selecting '(all)' in the Clinic dropdown this attribute will be emptied and disabled. If no selection is made in this attribute, the report will include all Clinics.

8.32.1.3 WIC Category Dropdown

This control allows the user to select the WIC Category to run the report against. The dropdown will be enabled when the Generate Income Eligibility Report dialog is active. It will display all WIC Categories listed in the WIC Category entity in alphabetical order. This list will include a value of '(all)'. This control is initially blank. If no selection is made in this attribute, the report will include all WIC Categories.

8.32.1.4 Race/Ethnicity Dropdown

This control allows the user to select the Race/Ethnicity to run the report against. The dropdown will be enabled when the Generate Income Eligibility Report dialog is active. The list will display all Races listed in the Reference Dictionary in alphabetical order. This list will include a value of "(all)". This control is initially blank. If no selection is made in this attribute, the report will include all races.

8.32.1.5 Proof of Income Dropdown

This control allows the user to select the Proof of Income to run the report against. The dropdown will be enabled when the Generate Income Eligibility Report dialog is active. The list displays Income Proof as defined in the Reference Dictionary in alphabetical order. This list will include a value of '(all)'. This control is initially blank. If no selection is made in this attribute, the report will include all Income Proof.

8.32.1.6 Report Destination Radio Button

This control allows the user to select either Display on Screen, Send to Printer or Save as PDF. The control will be enabled when the dialog is enabled. It will default to Display on Screen.

8.32.1.7 OK Button

This control allows the user to instruct the system to run the Income Eligibility Report. The OK button will be enabled when the Generate Income Eligibility Report dialog is active. (See *Saving the Data* in the Processing section below). Characteristics for the OK button are defined in *Consistencies*.

8.32.1.8 Cancel Button

This control allows the user to exit the Generate Income Eligibility Report dialog without generating the report. The Cancel button will be enabled when the Generate Income Eligibility Report dialog is active. Characteristics for the Cancel button are defined in *Consistencies*.

8.32.2 Processes

This section describes the processes (navigation) that take place as a result of the actions taken on the Generate Income Eligibility Report dialog.

8.32.2.1 Initializing the Interface

Upon initial presentation of the dialog:

- The title bar text will be set to "Generate Income Eligibility Report"
- The Clinic will be initially blank".
- The Clinic dropdown will be initially blank"
- The WIC Category will be initially blank'
- The Race/Ethnicity will be initially blank'
- The Proof of Income will be initially blank'
- The Report Destination will default to Display on Screen radio button.

8.32.2.2 Edits

Upon selection of the OK button:

- If a selection is not made in the following:
  - Clinic dropdown
  - Clinic dropdown
  - WIC Category dropdown
  - Race/Ethnicity dropdown
  - Proof of Income dropdown

  the system will invoke a standard error message with the text "A selection is required in the <name of control>."

8.32.2.3 Generate Income Eligibility Report

Upon successful completion of the edits listed above, the system will generate the Income Eligibility Report to the selected report destination:

- If Report Destination is Screen, the system will display the report on the screen.
- If Report Destination is Printer, the system will generate the report and send it to the selected other output printer (see *System Tools*).
- If Report Destination is PDF, the system will invoke the "Save As" dialog. The user can select the folder and enter the file name, or cancel. Upon entering a file name and selecting Save, the system will save the file to the selected folder.

8.33 Income Eligibility (Output) OPR029

The Income Eligibility report shows what income eligibility groups are being served through out the state. The amount of information on the report will depend on the options selected on the Generate Income Eligibility Report Dialog. All participants in a valid certification at the time the report is requested are included in this report.

Income Eligibility

```
OPR029
                            STATE DEPARTMENT OF HEALTH                 RUN DATE MM/DD/CCYY
                                INCOME ELIGIBILITY                     RUN TIME HH:MM:SS
CLINIC  XX              X_X_X_X_X_X_X_XCLINIC_DESCRIPTIONX_X_X_X_X_X_X_X   PAGE:    XXX

RACE/ETHNICITY   XXXXXXXXXXXXXXXXXXXXX
PROOF OF INCOME  XXXXXXXXXXXXXXXXXXXX


WIC CATEGORY             100%    101%-125%   126%-175%   176%-185%   186%-250%    >250%
WOMEN -PREGNANT

     PRIORITY 1       XXX,XXX     XXX,XXX    XXX,XXX    XXX,XXX     XXX,XXX    XXX,XXX
     PRIORITY 2       XXX,XXX     XXX,XXX    XXX,XXX    XXX,XXX     XXX,XXX    XXX,XXX
     PRIORITY 3       XXX,XXX     XXX,XXX    XXX,XXX    XXX,XXX     XXX,XXX    XXX,XXX
     PRIORITY 4       XXX,XXX     XXX,XXX    XXX,XXX    XXX,XXX     XXX,XXX    XXX,XXX
     PRIORITY 5       XXX,XXX     XXX,XXX    XXX,XXX    XXX,XXX     XXX,XXX    XXX,XXX
     PRIORITY 6       XXX,XXX     XXX,XXX    XXX,XXX    XXX,XXX     XXX,XXX    XXX,XXX
     PRIORITY UNKNOWN XXX,XXX     XXX,XXX    XXX,XXX    XXX,XXX     XXX,XXX    XXX,XXX

       SUB TOTAL      XXX,XXX     XXX,XXX    XXX,XXX    XXX,XXX     XXX,XXX    XXX,XXX

WOMEN – N0N-BREASTFEEDING

     PRIORITY 1       XXX,XXX     XXX,XXX    XXX,XXX    XXX,XXX     XXX,XXX    XXX,XXX
     PRIORITY 2       XXX,XXX     XXX,XXX    XXX,XXX    XXX,XXX     XXX,XXX    XXX,XXX
     PRIORITY 3       XXX,XXX     XXX,XXX    XXX,XXX    XXX,XXX     XXX,XXX    XXX,XXX
     PRIORITY 4       XXX,XXX     XXX,XXX    XXX,XXX    XXX,XXX     XXX,XXX    XXX,XXX
     PRIORITY 5       XXX,XXX     XXX,XXX    XXX,XXX    XXX,XXX     XXX,XXX    XXX,XXX
     PRIORITY 6       XXX,XXX     XXX,XXX    XXX,XXX    XXX,XXX     XXX,XXX    XXX,XXX
     PRIORITY UNKNOWN XXX,XXX     XXX,XXX    XXX,XXX    XXX,XXX     XXX,XXX    XXX,XXX

       SUB TOTAL      XXX,XXX     XXX,XXX    XXX,XXX    XXX,XXX     XXX,XXX    XXX,XXX


         1         2         3         4         5         6         7         8         9         0         1         2
123456789012345678901234567890123456789012345678901234567890123456789012345678901234567890123456789012345678901234567890123456789012
```

Income Eligibility

```
OPR029
                                  STATE DEPARTMENT OF HEALTH                RUN DATE MM/DD/CCYY
                                      INCOME ELIGIBILITY                     RUN TIME HH:MM:SS
CLINIC  XX                X_X_X_X_X_X_X_XCLINIC_DESCRIPTIONX_X_X_X_X_X_X_X   PAGE:    XXX

RACE/ETHNICITY   XXXXXXXXXXXXXXXXXXXXX
PROOF OF INCOME XXXXXXXXXXXXXXXXXXXXX

WIC CATEGORY               100%      101%-125%    126%-175%    176%-185%    186%-250%     >250%
WOMEN -BREASTFEEDING

    PRIORITY 1         XXX,XXX      XXX,XXX      XXX,XXX      XXX,XXX      XXX,XXX      XXX,XXX
    PRIORITY 2         XXX,XXX      XXX,XXX      XXX,XXX      XXX,XXX      XXX,XXX      XXX,XXX
    PRIORITY 3         XXX,XXX      XXX,XXX      XXX,XXX      XXX,XXX      XXX,XXX      XXX,XXX
    PRIORITY 4         XXX,XXX      XXX,XXX      XXX,XXX      XXX,XXX      XXX,XXX      XXX,XXX
    PRIORITY 5         XXX,XXX      XXX,XXX      XXX,XXX      XXX,XXX      XXX,XXX      XXX,XXX
    PRIORITY 6         XXX,XXX      XXX,XXX      XXX,XXX      XXX,XXX      XXX,XXX      XXX,XXX
    PRIORITY UNKNOWN   XXX,XXX      XXX,XXX      XXX,XXX      XXX,XXX      XXX,XXX      XXX,XXX

      SUB TOTAL        XXX,XXX      XXX,XXX      XXX,XXX      XXX,XXX      XXX,XXX      XXX,XXX

WOMEN TOTAL

    PRIORITY 1         XXX,XXX      XXX,XXX      XXX,XXX      XXX,XXX      XXX,XXX      XXX,XXX
    PRIORITY 2         XXX,XXX      XXX,XXX      XXX,XXX      XXX,XXX      XXX,XXX      XXX,XXX
    PRIORITY 3         XXX,XXX      XXX,XXX      XXX,XXX      XXX,XXX      XXX,XXX      XXX,XXX
    PRIORITY 4         XXX,XXX      XXX,XXX      XXX,XXX      XXX,XXX      XXX,XXX      XXX,XXX
    PRIORITY 5         XXX,XXX      XXX,XXX      XXX,XXX      XXX,XXX      XXX,XXX      XXX,XXX
    PRIORITY 6         XXX,XXX      XXX,XXX      XXX,XXX      XXX,XXX      XXX,XXX      XXX,XXX
    PRIORITY UNKNOWN   XXX,XXX      XXX,XXX      XXX,XXX      XXX,XXX      XXX,XXX      XXX,XXX

      TOTAL            XXX,XXX      XXX,XXX      XXX,XXX      XXX,XXX      XXX,XXX      XXX,XXX


         1         2         3         4         5         6         7         8         9         0         1         2
123456789012345678901234567890123456789012345678901234567890123456789012345678901234567890123456789012345678901234567890123456789012
```

Income Eligibility

```
OPR029
                                    STATE DEPARTMENT OF HEALTH                    RUN DATE MM/DD/CCYY
                                        INCOME ELIGIBILITY                        RUN TIME HH:MM:SS
CLINIC  XX                    X_X_X_X_X_X_X_XCLINIC_DESCRIPTIONX_X_X_X_X_X_X_X_X  PAGE:    XXX

RACE/ETHNICITY  XXXXXXXXXXXXXXXXXXXX
PROOF OF INCOME XXXXXXXXXXXXXXXXXXXX

WIC CATEGORY                 100%     101%-125%   126%-175%   176%-185%   186%-250%    >250%
CHILD

     PRIORITY 1          XXX,XXX     XXX,XXX     XXX,XXX     XXX,XXX     XXX,XXX    XXX,XXX
     PRIORITY 2          XXX,XXX     XXX,XXX     XXX,XXX     XXX,XXX     XXX,XXX    XXX,XXX
     PRIORITY 3          XXX,XXX     XXX,XXX     XXX,XXX     XXX,XXX     XXX,XXX    XXX,XXX
     PRIORITY 4          XXX,XXX     XXX,XXX     XXX,XXX     XXX,XXX     XXX,XXX    XXX,XXX
     PRIORITY 5          XXX,XXX     XXX,XXX     XXX,XXX     XXX,XXX     XXX,XXX    XXX,XXX
     PRIORITY 6          XXX,XXX     XXX,XXX     XXX,XXX     XXX,XXX     XXX,XXX    XXX,XXX
     PRIORITY UNKNOWN XXX,XXX        XXX,XXX     XXX,XXX     XXX,XXX     XXX,XXX    XXX,XXX

        TOTAL   XXX,XXX       XXX,XXX      XXX,XXX      XXX,XXX      XXX,XXX    XXX,XXX

INFANT

     PRIORITY 1          XXX,XXX     XXX,XXX     XXX,XXX     XXX,XXX     XXX,XXX    XXX,XXX
     PRIORITY 2          XXX,XXX     XXX,XXX     XXX,XXX     XXX,XXX     XXX,XXX    XXX,XXX
     PRIORITY 3          XXX,XXX     XXX,XXX     XXX,XXX     XXX,XXX     XXX,XXX    XXX,XXX
     PRIORITY 4          XXX,XXX     XXX,XXX     XXX,XXX     XXX,XXX     XXX,XXX    XXX,XXX
     PRIORITY 5          XXX,XXX     XXX,XXX     XXX,XXX     XXX,XXX     XXX,XXX    XXX,XXX
     PRIORITY 6          XXX,XXX     XXX,XXX     XXX,XXX     XXX,XXX     XXX,XXX    XXX,XXX
     PRIORITY UNKNOWN XXX,XXX        XXX,XXX     XXX,XXX     XXX,XXX     XXX,XXX    XXX,XXX

        TOTAL   XXX,XXX       XXX,XXX      XXX,XXX      XXX,XXX      XXX,XXX    XXX,XXX


        1         2         3         4         5         6         7         8         9         0         1         2
12345678901234567890123456789012345678901234567890123456789012345678901234567890123456789012345678901234567890123456789012
```

8.33.1 Data Elements

8.33.1.1 WIC Category

8.33.1.1.1 Origin of Data Element

This attribute is taken from the WIC_Status attribute of the Member entity. The description of the associated category is printed.

8.33.1.1.2 Format

This is a twenty-character value.

8.33.1.2 100%

8.33.1.2.1 Origin of Data Element

All participants in a valid certification at the point the report is submitted who are at or below 100% of the poverty line are included.

Calculate the 100 % value using the AnnualAmount attribute from the IncomeEligibilityAmount entity. 100% value = AnnualAmount divided by 1.85.

8.33.1.2.2 Format

This value is a six-digit number.

8.33.1.3 101% - 125%

8.33.1.3.1 Origin of Data Element

All participants in a valid certification at the point the report is submitted who are at 101% - 125% of poverty line are included.

Calculate the 125% value using the calculated 100% value. 125% value = 100% value times 1.25.

8.33.1.3.2 Format

This value is a six-digit number.

8.33.1.4 126% - 175%

8.33.1.4.1 Origin of Data Element

All participants in a valid certification at the point the report is submitted who are at 126% - 175% of poverty line are included.

Calculate the 175% value using the calculated 100% value. 175% value = 100% value times 1.75.

8.33.1.4.2 Format

This value is a six-digit number.

8.33.1.5 176% - 185%

8.33.1.5.1 Origin of Data Element

All participants in a valid certification at the point the report is submitted who are at 176% - 185% of poverty line are included.

185% = the value of the AnnualAmount attribute in the IncomeEligibilityAmount entity.

8.33.1.5.2 Format

This value is a six-digit number.

8.33.1.6 186% - 250%

8.33.1.6.1 Origin of Data Element

All participants in a valid certification at the point the report is submitted who are at 186% - 250% of poverty line are included.

Calculate the 250% value using the calculated 100% value. 250% value = 100% value times 2.50.

8.33.1.6.2 Format

This value is a six-digit number.

8.33.1.7 > 250%

8.33.1.7.1 Origin of Data Element

All participants in a valid certification at the point the report is submitted who are at or above the 250% of poverty line are included.

8.33.1.7.2 Format

This value is a six-digit number.

8.33.2 Filter Criteria

8.33.2.1 Base of Data

All participants in a valid certification at the time the report is submitted are included. All participants that meet the following selection criteria are included.

- The Cert_Effective_Date attribute of the Cert_Contact entity is less than or equal to the current date.
- The Cert_End_Date of the Cert_Contact entity is greater than or equal to the current date.
- The Cert_Term_Date of the Cert_Contact entity is not valued.

8.33.2.1.1 Clinic, Clinic

If all agencies are selected, data for each individual clinic will be listed separately.

If an individual clinic and all Clinics are selected, individual Clinic data for that clinic will be listed separately.

If an individual clinic and individual Clinic are selected, the data for the selected clinic/Clinic will be listed.

8.33.2.1.2 Category

If all category values are selected, data for each category will be listed separately.

If an individual category is selected, data for that category will be listed.

8.33.2.1.3 Race/Ethnicity

If all race/ethnicity values are selected, only data for each race/ethnicity value will be included.

If an individual race/ethnicity value is selected, only data for that race/ethnicity values will be included.

8.33.2.1.4 Proof of Income

If all proof of income values is selected, only data for each proof of income value will be included.

If an individual proof of income value is selected, only data for that proof of income value will be included.

8.33.2.2 Sort Order

This report will be sorted by clinic, Clinic, category, race/ethnicity, and proof of income, depending on selection criteria of the report.

8.33.2.2.1 Clinic, Clinic

If more than one clinic is selected, the report will be sorted by clinic code. If more than one Clinic is selected, the report will be sorted by clinic code then Clinic code.

8.33.2.2.2 Race/Ethnicity

If more than one race/ethnicity value is selected, the report will be sorted by clinic code then Clinic code then race/ethnicity.

8.33.2.2.3 Proof of Income

If more than one proof of income value is selected, the report will be sorted by clinic code then Clinic code then race/ethnicity then proof of income.

8.33.2.2.4 Category

If more than one category is selected, the report will be sorted by clinic code then Clinic code then race/ethnicity then proof of income then category. Category will use the following sequence.

- Women – Pregnant
- Women – Non-Breastfeeding
- Women – Breastfeeding
- Women – Total
- Child
- Infant - Total

8.33.2.3 Control Breaks

8.33.2.3.1 Clinic Identifier

On a change of clinic identifier a page break will occur.

8.33.2.3.2 Clinic Identifier

On a change of Clinic identifier a page break will occur.

8.33.2.3.3 Race/Ethnicity

On a change of race/ethnicity identifier a page break will occur.

8.33.2.3.4 Proof of Income

On a change of proof of income identifier a page break will occur.

8.33.2.4 Sub Total

The sub totals for each WIC Category and the total for all women WIC categories are at the end of each WIC Category section.

8.33.2.5 Grand Total

No state totals have been defined for this report.

8.33.3 Frequency and Distribution

Frequency   - On demand

Data current as of   - Date of run

8.34 Generate Outreach Listing Report Dialog

This dialog will allow the user to generate a list of outreach agencies and address labels for the selected filter criteria. It is invoked when the user selects the Outreach Listing Report list item from the Generate Reports dialog.
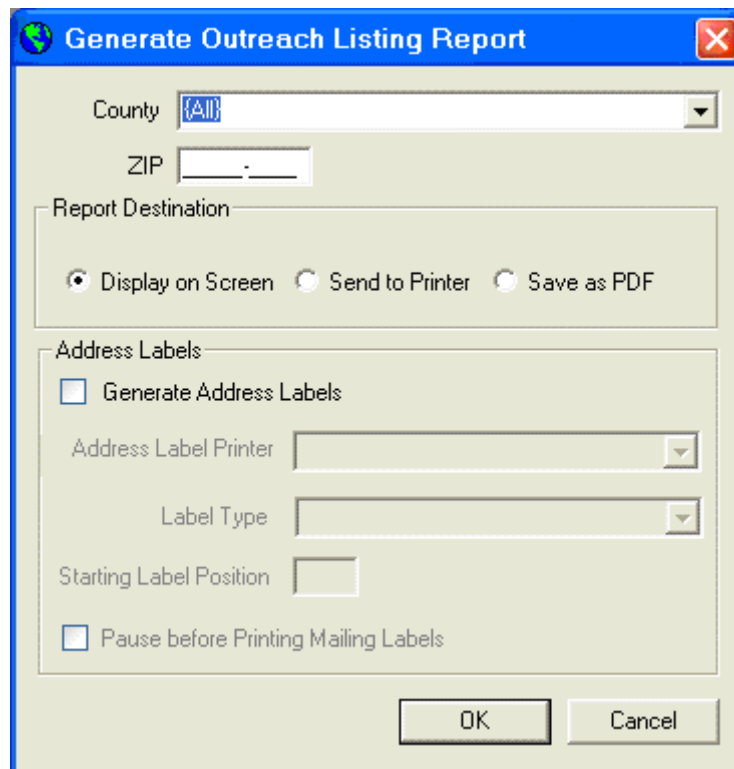
Figure 19 - Generate Outreach Listing Report Dialog

8.34.1 Controls

This section describes the behavior of the controls on the Generate Outreach Listing Report Dialog.

8.34.1.1 County Dropdown

This control allows the user to select the county for which to print a listing of outreach agencies. The dropdown will be enabled when the dialog is active. It will contain a list of valid counties from a table in the lookup database. Additionally, it will contain and entry for {All} and {None Selected}. It will initially default to the {All} item.

8.34.1.2 ZIP

This text box will allow the user to enter the zip code for which to print a listing of outreach agencies. This text box will be enabled when the dialog is active. The field will initially default to blank. The masked edit box will only allow the entry of numeric digits. The mask for the box will be "#####-####" to allow entry of a four digit ZIP extension, if known.

8.34.1.3 Report Destination Radio Button

This control allows the user to select either Display on Screen, Send to Printer or Save as PDF. The control will be enabled when the dialog is enabled. It will default to Display on Screen.

8.34.1.4 Generate Address Labels Check Box

The Generate Address Labels check box allows the user to generate address labels for the outreach agencies that meet the filter criteria. The check box will be enabled when the dialog is active.

8.34.1.5 Address Label Printer Dropdown

This control allows the user to select the printer on which to print the mailing labels. The dropdown will be enabled when the dialog is active and the Generate Address Labels check box is checked. It will contain a list of available printers. The dropdown will only contain a list of defined other output printers. The field is initially blank.

8.34.1.6 Label Type Dropdown

This control will allow the user to select the mailing label type. The control will be enabled when the dialog is active and a printer is selected in the Address Label Printer dropdown . It will be filled with a list of the labels that may be printed by the application. The control will default to blank when enabled

8.34.1.7 Starting Label Text Box

This control will allow the user to select which mailing label to start with on the label sheet. The control will be enabled when a laser printer is selected from the Label Printer dropdown. The control allows entry of numeric digits. The minimum value is 1 and the maximum value is 30.

8.34.1.8 Pause before Printing Mailing Labels Check Box

This control will allow the user to instruct the system to pause before printing mailing labels on the printer so that mailing label stock may be loaded into the printer for producing the mailing labels. The control will be enabled when the Print Mailing Labels check box is checked. When enabled, it will be initially checked.

8.34.1.9 OK Button

The OK button will be enabled when the dialog is active. Characteristics for the OK button are defined in *Consistencies*.

8.34.1.10 Cancel Button

The Cancel button will be enabled when the dialog is active. Characteristics for the Cancel button are defined in *Consistencies*.

8.34.2 Processes

This section describes the processes (navigation) that take place as a result of the actions taken on the Print Outreach Database Listing Report Dialog.

8.34.2.1 Initializing the Interface

Upon the initial display of the dialog:

- The title bar text will be set to "Generate Outreach Listing Report".
- The County drop down list will default to "{All}".
- The ZIP field will be initially blank.
- The Print Address Labels check box will be initially unchecked.
- All other fields will be initially disabled and blank.

8.34.2.2 Edits

Upon selection of the OK button:

- If no selection has been made in the County drop down list and no entry has been made in the ZIP entry field, the system will invoke a standard error message with the text "Either a County or a ZIP must be selected."
- If an incomplete ZIP has been entered, the system will invoke a standard error message with the text "A complete entry is required for the <control label>." If any part of the four-digit extension is entered, the entire extension is required.
- If the label printer dropdown is enabled and no label printer has been selected in the Label Printer dropdown, the system will invoke a standard error message with the text "You must select a label printer to print address labels."
- If the Label Type selected is Avery 5160 and the Starting Label text box enabled and the value entered is less than 1 or greater than 30, the system will invoke a standard message with the text, "Starting Label range is 1 through 30."
- If the Label Type selected is Avery 5163 and the text box enabled and the value entered is less than 1 or greater than 10, the system will invoke a standard message with the text, "Starting Label range is 1 through 10."
- If the Starting Label text box is enabled and is blank, a message is displayed, "An entry is required for the Starting Label."
- If the Label Type dropdown is enabled and no selection is made, the system will invoke a standard error message with the text "A selection is required in the Label Type."
- If no outreach agencies are found that meet the criteria entered on the dialog, the system will invoke a standard error message with the text "There are no outreach agencies found that meet the specified criteria."

8.34.2.3 Generate Outreach Listing

Upon successful completion of the edits listed above, the system will generate the Outreach Listing report to the selected report destination:

- If Report Destination is Screen, the system will display the list on the screen.
- If Report Destination is Printer, the system will generate the list and send it to the selected other output printer (see *System Tools*).
- If Report Destination is PDF, the system will invoke the "Save As" dialog. The user can select the folder and enter the file name, or cancel. Upon entering a file name and selecting Save, the system will save the list in PDF format to the selected folder.

8.34.2.4 Print Labels

If the Print Mailing Labels check box is selected:

- If the user has selected the Report Destination of "Send to Printer" and the Pause before Printing check box is checked, the system will pause after printing and invoke a standard message with the text "Load mailing labels for printing and press OK when ready." This provides time for the user to load the label stock and instruct the system when ready to print., otherwise, the system will invoke this message upon return from the Print Preview or saving the PDF document.
- If the Pause before Printing check box is un-checked, the system will immediately print the labels following the generation of the Outreach Listing to the selected label printer or upon return from the Print Preview or Saving the PDF document without pausing.
- Printing of labels will begin on the specified number to the specified printer filling in the first column down then moving to the second column and then to the third column.

8.34.2.5 Cancel

Upon selection of the Cancel button the system will dismiss the dialog and return to the Generate Reports dialog.

8.35 Outreach Database Listing Report – State (Output)

This report is a detail report of state outreach agencies.

```
                        Outreach Listing Report - State

 <REPORT HEADING>           OUTREACH LISTING REPORT              07/12/2000
 <STAFF MEMBER>                                          12:30:00
                                                           PAGE   1
OUTREACH AGENCY
COUNTY                         AGENCY, CONTACT, ADDRESS
----------------------------------------------------------------------
NORTHEAST                   BAPTIST MEMORIAL HEALTH CENTER
                            DR MARY HARDER,  609-555-3245
                            14 ADAMS AVENUE  609-555-5344
                            SUITE 288
                            WASHINGTON, DC  88888

                            ST. JAMES HEALTH CENTER
                            MR. JOHN HOPKINS, 609-555-3843
                            383 55TH STREET   609-555-3388
                            2ND FLOOR
                            WASHINGTON, DC  88888


NORTHWEST                   ST. JAMES HEALTH CENTER
                            MS. SARAH JOHNSON, 609-555-3844
                            373 57TH STREET    609-555-3255
                            BLDG 88
                            WASHINGTON, DC  88888

                            WESTHEIGHT COMMUNITY CENTER
                            MR. ROBERT BRANDENBURG, 609-555-2353
                            1245 78TH STREET       609-555-3266
                            SUITE 883
                            WASHINGTON, DC  88888
```

8.35.1 Data Elements

This section describes the data elements that will print on the document.

8.35.1.1 Report Title

The title of the report will be the text "Outreach Listing Report - State".

8.35.1.1.1 Origin of Data Element

This is a literal value.

8.35.1.1.2 Format

The value will print as its literal value.

8.35.1.2 Outreach Agency County

This value will be the county where the outreach agency is located.

8.35.1.2.1 Origin of Data Element

The value will be taken from the CountyCD attribute of the ORANIZATION entity.

8.35.1.2.2 Format

The value will print as its literal value.

8.35.1.3 Outreach Agency Name

This value will be the full name of the outreach agency.

8.35.1.3.1 Origin of Data Element

The value will be taken from the Name attribute of the ORGANIZATION entity.

8.35.1.3.2 Format

The value will print as its literal value.

8.35.1.4 Outreach Agency Contact

This value will be the name of the contact for the outreach agency.

8.35.1.4.1 Origin of Data Element

The value will be taken from the ContactName attribute of the ORGANIZATION entity.

8.35.1.4.2 Format

The value will print as its literal value.

8.35.1.5 Outreach Agency Telephone Number

This value will be the telephone number for the outreach agency.

8.35.1.5.1 Origin of Data Element

The value will be taken from the Telephone1 attribute of the ORGANIZATION entity.

8.35.1.5.2 Format

The value will print in the format *###-###-####*.

8.35.1.6 Outreach Agency Address 1

This value will be the mailing address for the outreach agency.

8.35.1.6.1 Origin of Data Element

The value will be taken from the Address1 attribute of the ORGANIZATION entity.

8.35.1.6.2 Format

The value will print as its literal value.

8.35.1.7 Outreach Agency Address 2

This value will be the mailing address for the outreach agency.

8.35.1.7.1 Origin of Data Element

The value will be taken from the Address2 attribute of the ORGANIZATION entity.

8.35.1.7.2 Format

The value will print as its literal value.

8.35.1.8 Outreach Agency City

This value will be the city for the outreach agency.

8.35.1.8.1 Origin of Data Element

The value will be taken from the City attribute of the ORGANIZATION entity.

8.35.1.8.2 Format

The value will print as its literal value.

8.35.1.9 Outreach Agency Mailing State

This value will be the mailing state for the outreach agency.

8.35.1.9.1 Origin of Data Element

The value will be taken from the StateCD attribute of the ORGANIZATION entity.

8.35.1.9.2 Format

The value will print as its literal value.

8.35.1.10 Outreach Agency Mailing ZIP Code

This value will be the mailing ZIP code for the outreach agency.

8.35.1.10.1 Origin of Data Element

The value will be taken from the ZIPCODE attribute of the ORGANIZATION entity.

8.35.1.10.2 Format

The value will print in #####-#### format.

8.35.2 Filter Criteria

8.35.2.1 Is Outreach Agency

The report will list all Organizations for all Agencies where the Organizations.IsOutreachAgency = 'Y'.

8.35.2.2 County

All outreach agencies that are located within the selected county will be included in the report. If the value of 'All' is selected in the County dropdown, all counties will be included in the report.

8.35.2.3 Zip Code

All outreach agencies that have a ZIP code that matches the one entered by the user will be included in the report. Partial ZIP field selection will be accommodated. For example, entering 802 will provide all ZIP codes beginning with those three numbers. If no ZIP code is entered, all ZIP codes will be included.

8.35.3 Sort Order

8.35.3.1 County

The report will be sorted first by county.

8.35.3.2 Outreach Agency Name

The report will be sorted by outreach agency name within the selected county.

8.35.4 Control Break

8.35.4.1 County

On a change of a CountyCD, a line break will occur.

8.35.5 Grand Total

No final total is included in the report.

8.36 State Outreach Agency Address Labels

8.36.1 Data Elements

This section describes the data elements that will print on the document.

```
St. James Health Center
     Mr. John Hopkins
     383 55th Street
       2ᴺᴰ Floor
 Washington, DC  66210
```

8.36.1.1 Outreach Agency Name

This value will be the full name of the outreach agency.

8.36.1.1.1 Origin of Data Element

The value will be taken from the Name attribute of the
ORGANIZATION entity.

8.36.1.1.2 Format

The value will print as its literal value.

8.36.1.2 Outreach Agency Contact

This value will be the name of the contact for the outreach agency.

8.36.1.2.1 Origin of Data Element

The value will be taken from the ContactName attribute of the
ORGANIZATION entity.

8.36.1.2.2 Format

The value will print as its literal value.

8.36.1.3 Outreach Agency Address 1

This value will be the mailing address for the outreach agency.

8.36.1.3.1 Origin of Data Element

The value will be taken from the Address1 attribute of the
ORGANIZATION entity.

8.36.1.3.2 Format

The value will print as its literal value.

8.36.1.4 Outreach Agency Address 2

This value will be the mailing address for the outreach agency.

8.36.1.4.1 Origin of Data Element

The value will be taken from the Address2 attribute of the
ORGANIZATION entity.

8.36.1.4.2 Format

The value will print as its literal value.

8.36.1.5 Outreach Agency City

This value will be the mailing city for the outreach agency.

8.36.1.5.1 Origin of Data Element

The value will be taken from the City attribute of the ORGANIZATION entity.

8.36.1.5.2 Format

The value will print as its literal value.

8.36.1.6 Outreach Agency State

This value will be the mailing state for the outreach agency.

8.36.1.6.1 Origin of Data Element

The value will be taken from the StateCD attribute of the ORGANIZATION entity.

8.36.1.6.2 Format

The value will print as its literal value.

8.36.1.7 Outreach Agency ZIP Code

This value will be the ZIP code for the outreach agency.

8.36.1.7.1 Origin of Data Element

The value will be taken from the ZIPCODE attribute of the ORGANIZATION entity.

8.36.1.7.2 Format

The value will print in #####-#### format.

8.36.2 Filter Criteria

8.36.2.1 Is Outreach Agency

The address labels will print all Organizations where the Organizations.IsOutreachAgency = 'Y'.

8.36.2.2 County

Address labels for outreach agencies where the Organization.CountyCD associated with the selected County will be printed. If the value of 'All' is selected in the County dropdown, all counties will be included in the report.

8.36.2.3 Zip Code

Address Labels for outreach agencies that have a Zip code that matches the one entered by the user will be included. Partial zip field selection will be accommodated. For example, entering 802 will provide all zip codes beginning with those three numbers. If no ZIP is entered, all ZIP codes will be included.

8.36.3 Sort Order

8.36.3.1 County

The address labels will be sorted first by county.

8.36.3.2 Outreach Agency Name

The address labels will be sorted by outreach agency name within the selected county.

8.36.4 Control Break

There are no control breaks defined.

8.36.5 Grand Total

No grand total is defined for address labels.

8.37 Generate Initial Certification Processing Standards Report

The Generate Initial Certification Processing Standards Report dialog allows the user to generate a report listing applicants who were scheduled to attend an initial certification appointment. It is invoked when the user selects the Initial Certification Processing Standards Report list item from the Reports display list.
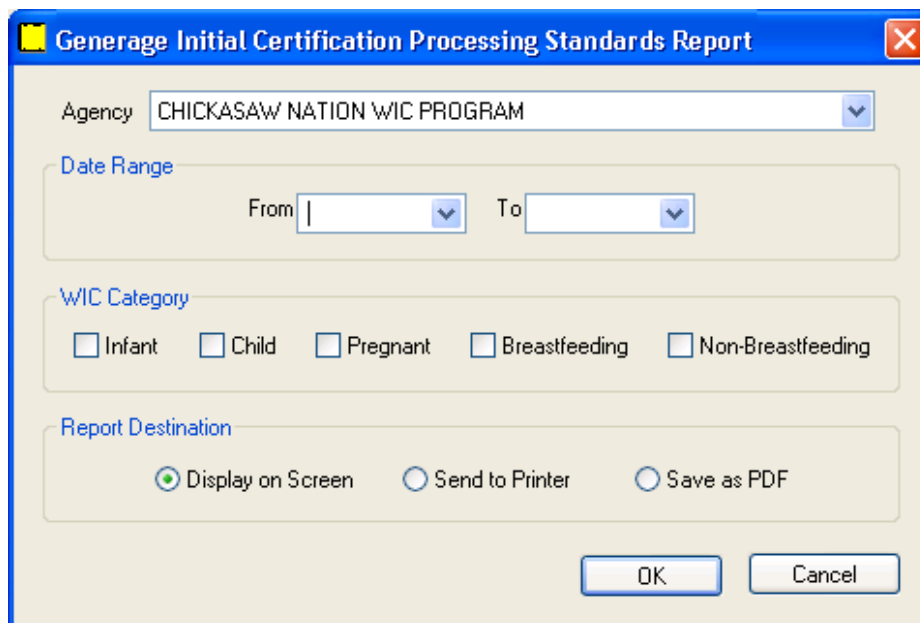

Figure 20 – Generate Initial Certification Processing Standards Report Dialog

8.37.1 Controls

8.37.1.1 Agency Dropdown

This control allows the user to select the Agency on which to filter the Initial Certification Processing Standards report. This list will display all Agencies in the state. The dropdown will be enabled when the Generate Initial Certification Processing Standards Report dialog is active. The characteristics for this field are defined in *Consistencies*.

8.37.1.2 Date Range From Masked Edit Box (From)

This control allows the user to enter the start date of the date range on which to filter the Initial Certification Processing Standards report. The masked edit box will be enabled when the Generate Initial Certification Processing Standards Report dialog is active. It will only accept entry of numeric digits. The mask on the box will be "##/##/####" to accept a date with a four digit year. The masked edit box will initially be blank.

8.37.1.3 Date Range To Masked Edit Box (To)

This control allows the user to enter the end date of the date range on which to filter the Initial Certification Processing Standards report. The masked edit box will be enabled when the Generate Initial Certification Processing Standards Report dialog is active. It will only accept entry of numeric digits. The mask on the box will be "##/##/####" to accept a date with a four digit year. The masked edit box will initially be blank.

8.37.1.4 Infant Check Box

The Infant check box will be enabled when the Generate Initial Certification Processing Standards Report dialog is active.

8.37.1.5 Child Check Box

The Child check box will be enabled when the Generate Initial Certification Processing Standards Report dialog is active.

8.37.1.6 Pregnant Check Box

The Infant check box will be enabled when the Generate Initial Certification Processing Standards Report dialog is active.

8.37.1.7 Breastfeeding Check Box

The Breastfeeding check box will be enabled when the Generate Initial Certification Processing Standards Report dialog is active.

8.37.1.8 Non-breastfeeding Check Box

The Non-breastfeeding check box will be enabled when the Generate Initial Certification Processing Standards Report dialog is active.

8.37.1.9 Report Destination Radio Button Group

This control allows the user to select either Display on Screen, Send to Printer or Save as PDF. The control will be enabled when the Generate Initial Certification Processing Standards Report dialog is active.

8.37.1.10 OK Button

This control allows the user to instruct the system to edit the values of the controls, generate the report, and exit the Generate Initial Certification Processing Standards Report dialog. The button will be enabled when the Generate Initial Certification Processing Standards Report dialog is active. Characteristics for the OK button are defined in *Consistencies*.

8.37.1.11 Cancel Button

This control allows the user to exit the Generate Initial Certification Processing Standards Report dialog without generating a report. The button will be enabled when the Generate Initial Certification Processing Standards Report dialog is active. Characteristics for the Cancel button are defined in *Consistencies*.

8.37.2 Processes

8.37.2.1 Initializing the Interface

Upon initial presentation of the dialog,

- The title bar text will be set to "Generate Initial Certification Processing Standards Report".
- The Date Range From masked edit box will be initially blank.
- The Date Range To masked edit box will be initially blank.
- The WIC Category check boxes will be initially cleared.
- The Display on Screen radio button will be selected.

8.37.2.2 Edits

Upon selection of the OK button:

The system will invoke a standard error message with the text "An entry is required in the {control label}" if an entry is not made in the following controls:

- Date Range From
- Date Range To

If a selection is not made in at least one of the WIC Category check boxes, the system will invoke a standard error message with the text "Please select at least one of the WIC Categories."

8.37.2.3 Generate Initial Certification Processing Standards Report

Upon selection of the OK button and all edits being passed, the system will generate the Initial Certification Processing Standards Report to the selected report destination:

- If Report Destination is Screen, the system will display the report on the screen.
- If Report Destination is Printer, the system will generate the report and send it to the selected other output printer (see System Tools).
- If Report Destination is PDF, the system will invoke the "Save As" dialog. The user can select the folder and enter the file name, or cancel. Upon entering a file name and selecting Save, the system will save the file to the selected folder.

8.38 Initial Certification Processing Standards Report (Output) CLN028

This report allows the user to print a list of applicants of a specified WIC Category or specified WIC categories who were scheduled to attend an initial certification appointment during a specified Date Range. The report is generated from the Generate Initial Certification Processing Standards Report dialog.

```
CLN028
                                  <STATE NAME DEPARTMENT OF HEALTH>                    RUN DATE: XX/XX/XXXX
                             INITIAL CERTIFICATION PROCESSING STANDARDS                RUN TIME:   XX:XX:XX
                                      11/01/2005 - 11/12/2005                          PAGE:            XXX

Agency: 001 - Smithville WIC Program
Clinic: 001 - Smithville WIC Clinic

                 CLIENT NAME                      WIC      REQUESTED   APPOINTMENT  NUMBER          FOLLOW-UP
STATE WIC ID     TELEPHONE/COMMENTS               CATEGORY DATE        DATE         OF DAYS  KEPT   DATE
 12956045        Janet M. Fitzgerald                 B     11/01/2005  11/03/2005     2        N    11/11/2005
                 219-555-0641

                 Prescreening Comments: Applicant will be out of town for the next 2 weeks.  She will call the clinic to
                                        schedule an appointment for an Initial Certification when she returns.

                 Follow-up Comments: Attempted to contact participant but phone number has been disconnected.

 12956045        Melissa X. Fitzgerald               B     11/01/2005  11/05/2005     4        N    11/15/2005
                 219-555-3478

 07345912        Johnny Q. Reginsky                  C     11/01/2005  11/03/2005     2        N    11/12/2005
                 219-555-9988

                 Appointment Comments: Applicant abruptly left clinic during certification process.

 00329378        Pauline A. Brownstone               I     11/01/2005  11/08/2005     7        N    11/18/2005
                 219-555-3726

 00034783        Margaret H. Thomlinson              N     11/01/2005  11/05/2005     4        N    11/15/2005
                 219-555-6323

 04584511        Reshetta P. Metcalf                 N     11/02/2005  11/12/2005    10        N    11/22/2005
                 219-555-3499

                                         *** END OF LISTING ***
```

8.38.1 Data Elements

8.38.1.1 State WIC ID

8.38.1.1.1 Origin of Data Element

This value comes from the Member.StateWICID.

8.38.1.1.2 Format

The value will print as its literal value.

8.38.1.2 Client Name

8.38.1.2.1 Origin of Data Element

The value will be taken from the Member.FirstName Member.MiddleInitial and Member.LastName.

8.38.1.2.2 Format

The value will print in {first name} {middle initial}. {last name} format.

8.38.1.3 Client Telephone Number

8.38.1.3.1 Origin of Data Element

The value will be taken from the Household.Telephone1.

8.38.1.3.2 Format

The value will print in ###-###-#### format.

8.38.1.4 WIC Category

8.38.1.4.1 Origin of Data Element

The value will be taken from the Member.WICStatus.

8.38.1.4.2 Format

The value will print as its literal value.

8.38.1.5 Requested Date

8.38.1.5.1 Origin of Data Element

The value will be taken from the Appointment.CreateDate.

8.38.1.5.2 Format

This is an eight-digit value formatted MM/DD/CCYY.

8.38.1.6 Appointment Date

8.38.1.6.1 Origin of Data Element

The value will be taken from the Appointment.AppointmentDate.

8.38.1.6.2 Format

This is an eight-digit value formatted MM/DD/CCYY.

8.38.1.7 Number of Days

8.38.1.7.1 Origin of Data Element

The value will be calculated as the difference between the Requested Date and the Appointment Date.

8.38.1.7.2 Format

The value will print in ### format.

8.38.1.8 Kept

8.38.1.8.1 Origin of Data Element

The value will be taken from the Appointment.AppointmentKept.

8.38.1.8.2 Format

The value will print as its literal value.

8.38.1.9 Follow-up Date

8.38.1.9.1 Origin of Data Element

The value will be taken from the Appointment.FollowupDate.

8.38.1.9.2 Format

This is an eight-digit value formatted MM/DD/CCYY.

8.38.1.10 Prescreening Comments (Comments)

8.38.1.10.1 Origin of Data Element

The value will be taken from the Member.PrescreeningComments.

8.38.1.10.2 Format

The value will print as its literal value.

8.38.1.11 Appointment Comments (Comments)

8.38.1.11.1 Origin of Data Element

The value will be taken from the Appointment.Comments for an appointment if comments were recorded. It will not be printed when comments were not recorded for an appointment, and it will not be printed for a group education class.

8.38.1.11.2 Format

The value will print as its literal value.

8.38.1.12 Follow-up Comments (Comments)

8.38.1.12.1 Origin of Data Element

The value will be taken from the Appointment.Comments for an appointment if comments were recorded. It will not be printed when comments were not recorded for an appointment, and it will not be printed for a group education class.

8.38.1.12.2 Format

The value will print as its literal value.

8.38.2 Filter Criteria

8.38.2.1 Base of Data

This report includes all applicants who were scheduled to attend an initial certification appointment and fit the criteria specified on the Generate Initial Certification Processing Standards Report dialog.

8.38.3 Sort Order

8.38.3.1 Appointment Date

The report will be sorted first in chronological order by Appointment Date.

8.38.3.2 WIC Category

The report will be sorted by WIC Category within Appointment Date.

8.38.4 Control Breaks

8.38.4.1 Clinic

A page break will occur at the change of Clinic.

8.38.5 Grand Total

Grand totals have not been defined for this report.

8.39 Generate One to One Reconciliation Dialog

The Generate One to One Reconciliation Report dialog allows the user to
generate a report of the individual status of redeemed food instrument and a
summary of the number of redeemed food instrument sand number per status.
It is invoked when the user selects the One to One Reconciliation list item from
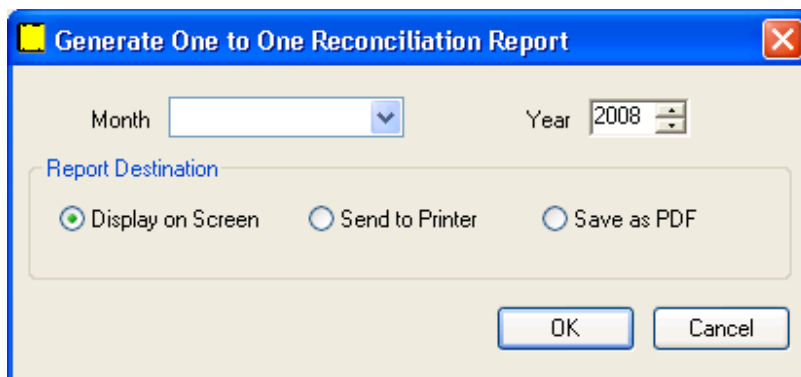the Generate Reports dialog.

Figure 21 – Generate One to One Reconciliation Report Dialog

8.39.1 Controls

This section describes the behavior of the controls on the Generate One to
One Reconciliation Report dialog.

8.39.1.1 Month Dropdown

This control allows the user to select the month to include in the report.
The dropdown will be enabled when the Generate One to One
Reconciliation Report dialog is active. This will be a read only drop down
list. It is filled with a list of months from the Reference Dictionary Table,
which is displayed in calendar month order within the list. It will default
to the current month as defined by the Current_Month_End_Date
attribute in the Process_Control table.

A selection is required.

8.39.1.2 Year Masked Edit Box and Spin Control

This control allows the user to specify the Calendar Year to include in the
report. The masked edit box and spin control will be enabled when the
Generate One to One Reconciliation Report dialog is active. The masked
edit box will only allow the entry of numeric digits. The maximum size of
the control will be four (4) characters. The masked edit box will default to
the current system year. Selection of the increment or decrement buttons
of the spin control will increase or decrease the value by one (1).

An entry is required. The year selected must be less than or equal to the
current system year.

8.39.1.3 Report Destination Radio Button

This control allows the user to select either Display on Screen, Send to Printer or Save as PDF. The control will be enabled when the dialog is enabled. It will default to Display on Screen.

8.39.1.4 OK Button

This control allows the user to instruct the system to edit the values of the controls, generate the report, and exit the Generate One to One Reconciliation Report dialog. The OK button will be enabled when the Generate One to One Reconciliation Report dialog is active. (See *Saving the Data* in the Processing section below). Characteristics for the OK button are defined in *Consistencies*.

8.39.1.5 Cancel Button

This control allows the user to exit the Generate One to One Reconciliation Report dialog without generating a report. The Cancel button will be enabled when the Generate One to One Reconciliation Report dialog is active. Characteristics for the Cancel button are defined in *Consistencies*.

8.39.2 Processes

This section describes the processes (navigation) that take place as a result of the actions taken on the Generate One to One Reconciliation Report dialog.

8.39.2.1 Initializing the Interface

Upon initial presentation of the dialog:

- The title bar text will be set to "Generate One to One Reconciliation Report"
- The Month dropdown will default to the current month as defined by the Current_Month_End_Date attribute in the Process_Control table.
- The Year masked edit box will default to the current system year.
- The Report Destination will default to Display on Screen radio button.

8.39.2.2 Edits

Upon selection of the OK button:

- If a selection is not made in the Month Dropdown, the system will invoke a standard error message with the text "A selection is required in the <name of control>."
- If an entry is not made in the Year masked edit box, the system will invoke a standard error message with the text "An entry is required for the <name of control>."
- Month and Year combined values are validated:

> o The value entered in the Year masked edit box must be between 1900 and the current system year or the system will invoke a standard error message with the text "The Year must be between 1900 and the current system year."
>
> o If the year entered is within the current system year and the month selected is greater than the current system month, the system will invoke a standard error message with the text, "Month and year entered must be less than or equal to current month and year."

8.39.2.3 Generate One to One Reconciliation Report

Upon successful completion of the edits listed above, the system will generate the One to One Reconciliation Report to the selected report destination:

- If Report Destination is Screen, the system will display the report on the screen.
- If Report Destination is Printer, the system will generate the report and send it to the selected other output printer (see *System Tools*).
- If Report Destination is PDF, the system will invoke the "Save As" dialog. The user can select the folder and enter the file name, or cancel. Upon entering a file name and selecting Save, the system will save the file to the selected folder.

8.39.2.4 Cancel

Upon selection of the Cancel button, the system will dismiss the Generate One to One Reconciliation Report dialog without producing the report and return the user to the Generate Reports dialog.

8.40 One to One Reconciliation (Output) FIN022

The One to One Reconciliation report is a report of the individual status of redeemed food instruments and a summary of the number of redeemed food instruments and number per status.

One to One Reconciliation

```
FIN022                                    <REPORTHEADING>                              RUN DATE: XX/XX/XXXX
<STAFFNAME>                            ONE TO ONE RECONCILIATION                       RUN TIME: HH:MM:SS
                                        MONTH OF <MONTH> <YEAR>                        PAGE: XXX

PARTICIPATION MONTH: <MONTH> <YEAR>


      CHECK SERIAL NUMBER          PAID AMOUNT        PAID DATE          STATUS
      XXXXXXXX                     $XXXX.XX           XXX/XXX/XXXX       XXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXX
      XXXXXXXX                     $XXXX.XX           XXX/XXX/XXXX       XXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXX
      XXXXXXXX                     $XXXX.XX           XXX/XXX/XXXX       XXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXX
      XXXXXXXX                     $XXXX.XX           XXX/XXX/XXXX       XXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXX
      XXXXXXXX                     $XXXX.XX           XXX/XXX/XXXX       XXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXX
      XXXXXXXX                     $XXXX.XX           XXX/XXX/XXXX       XXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXX
      XXXXXXXX                     $XXXX.XX           XXX/XXX/XXXX       XXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXX
      XXXXXXXX                     $XXXX.XX           XXX/XXX/XXXX       XXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXX
      XXXXXXXX                     $XXXX.XX           XXX/XXX/XXXX       XXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXX
      XXXXXXXX                     $XXXX.XX           XXX/XXX/XXXX       XXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXX
      XXXXXXXX                     $XXXX.XX           XXX/XXX/XXXX       XXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXX
      XXXXXXXX                     $XXXX.XX           XXX/XXX/XXXX       XXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXX
      XXXXXXXX                     $XXXX.XX           XXX/XXX/XXXX       XXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXX
      XXXXXXXX                     $XXXX.XX           XXX/XXX/XXXX       XXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXX
      XXXXXXXX                     $XXXX.XX           XXX/XXX/XXXX       XXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXX
      XXXXXXXX                     $XXXX.XX           XXX/XXX/XXXX       XXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXX
      XXXXXXXX                     $XXXX.XX           XXX/XXX/XXXX       XXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXX
      XXXXXXXX                     $XXXX.XX           XXX/XXX/XXXX       XXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXX
      XXXXXXXX                     $XXXX.XX           XXX/XXX/XXXX       XXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXX




1         2         3         4         5         6         7         8         9         0         1         2         3         4
123456789012345678901234567890123456789012345678901234567890123456789012345678901234567890123456789012345678901234567890123456789012
```

One to One Reconciliation

```
FIN022                              <REPORTHEADING>                              RUN DATE: XX/XX/XXXX
<STAFFNAME>                     ONE TO ONE RECONCILIATION                        RUN TIME: HH:MM:SS
                               MONTH OF <MONTH> <YEAR>                           PAGE: XXX


PARTICIPATION MONTH: <MONTH> <YEAR>


_____
GRAND TOTALS:
                                        COUNT OF VALIDLY REDEEMED:       XXX,XXX
                        COUNT OF LOST / STOLEN BUT STILL REDEEMED:       XXX,XXX
                              COUNT OF VOIDED BUT STILL REDEEMED:        XXX,XXX
                                            COUNT OF UNMATCHED:          XXX,XXX
                                                   TOTAL COUNT:          XXX,XXX


                              TOTAL VALUE OF VALIDLY REDEEMED:     $XXX,XXX.XX
              TOTAL VALUE OF LOST / STOLEN BUT STILL REDEEMED:     $XXX,XXX.XX
                    TOTAL VALUE OF VOIDED BUT STILL REDEEMED:      $XXX,XXX.XX
                                   TOTAL VALUE OF UNMATCHED:       $XXX,XXX.XX
                                                  TOTAL VALUE:    $XXX,XXX.XX



                                    ***END OF LISTING***



1         2         3         4         5         6         7         8         9         0         1         2         3         4
123456789012345678901234567890123456789012345678901234567890123456789012345678901234567890123456789012345678901234567890123456789012
```

8.40.1 Data Elements

8.40.1.1.1 ReportHeading

8.40.1.1.1.1 Origin of Data Element

This value is pulled from the REPORTHEADING business rule for the client.

8.40.1.1.1.2 Format

The value will print as its literal value.

8.40.1.2 Check Serial Number

8.40.1.2.1 Origin of Data Element

This value comes from ???.

8.40.1.2.2 Format

The value will print as its literal value.

8.40.1.3 Check Serial Number

8.40.1.3.1 Origin of Data Element

This value comes from ???.

8.40.1.3.2 Format

The value will print as its literal value.

8.40.1.4 Paid Amount

8.40.1.4.1 Origin of Data Element

This value comes from ???.

8.40.1.4.2 Format

The value will print as its literal value.

8.40.1.5 Paid Date

8.40.1.5.1 Origin of Data Element

This value comes from ???.

8.40.1.5.2 Format

The value will print as its literal value.

8.40.1.6 Status

8.40.1.6.1 Origin of Data Element

This value comes from ???.

8.40.1.6.2 Format

The value will print as its literal value.

8.40.2 Filter Criteria

8.40.2.1 Participation Month

This report includes all food instruments redeemed during the participation month specified on the Generate One to One Report dialog.

8.40.3 Sort Order

8.40.3.1 Check Number

The report will be sorted by check number.

8.40.4 Control Breaks

8.40.4.1 Participation Month

A page break will occur at the change in participation month.

8.40.5 Grand Total

At the end of the report, the number of food instruments redeemed during the specified participation month will be summarized as follows:

- Total number of food instruments validly issued
- Total number of food instruments marked as lost or stolen
- Total number of food instruments expired
- Total number of food instruments unmatched

The summary will be followed by a grand total of the number of food instruments redeemed for the specified participation month.

After the total number of food instruments redeemed, the value of food instruments redeemed during the specified participation month will be summarized as follows:

- Total value of food instruments validly issued
- Total value of food instruments marked as lost or stolen
- Total value of food instruments expired
- Total value of food instruments unmatched

The summary will be followed by a grand total of the value of food instruments redeemed for the specified participation month.

8.40.6 Frequency and Distribution

Frequency   - On Demand

Data current as of   - ???

8.41 Generate Participation vs. Enrollment Monthly Report Dialog

When this report is selected, the system will display the Generate Participation vs. Enrollment Monthly Report dialog to select criteria for printing the Participation vs. Enrollment monthly report.
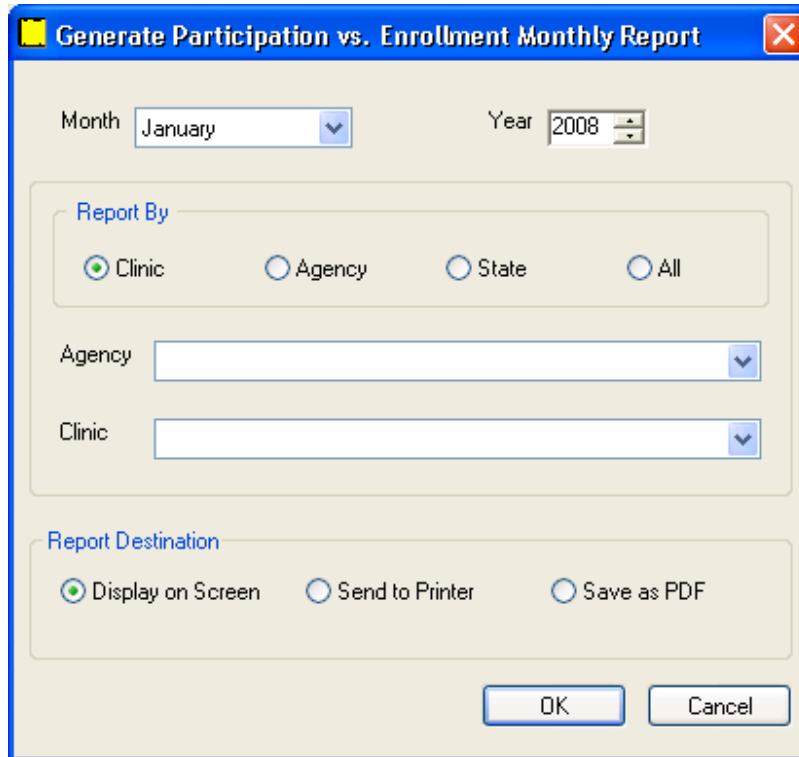

Figure 22 – Generate Participation vs. Enrollment Monthly Report dialog

8.41.1 Controls

8.41.1.1 Month Dropdown

This control allows the user to select report month. The control will be enabled when the Generate Participation vs. Enrollment Monthly Report dialog is enabled. It will be filled with a list of months from the ReferenceDictionary entity, displayed in calendar month order within the list. It will default to the current month of the Process_Control entity.

8.41.1.2 Year Masked Edit Box and Spin Control

This control allows the user to specify the year associated with the month that is to be reported. The masked edit box and spin control will be enabled when the Generate Participation vs. Enrollment Monthly Report dialog is enabled. The masked edit box will only allow the entry of numeric digits. The maximum size of the control will be four (4) characters. The masked edit box will default to the current year of the Process_Control entity. Selection of the increment or decrement buttons of the spin control will increase or decrease the value by one (1).

8.41.1.3 Report By Radio Button

This control allows the user to select a report break. Clinic break only, Agency break only, State grand total only or all three. The control will be enabled when the Generate Participation vs. Enrollment Monthly Report Dialog is enabled. It will default to Clinic.

8.41.1.4 Agency Dropdown List

This control allows the user to select a specific agency. The control will be enabled when the Generate Participation vs. Enrollment Monthly Report dialog is enabled. It will be disabled if the Report By value of All or State is selected. It will be filled with all agencies in the agency entity. It will default to blank. Characteristics for the Agency dropdown are defined in *Consistencies*.

8.41.1.5 Clinic Dropdown List

This control allows the user to select a specific clinic. The control will be enabled when the Generate Participation vs. Enrollment Monthly Report dialog is enabled. It will be disabled if the Report By value of Agency or All or State is selected. It will be filled with all clinics in the clinic entity for the selected agency (by Agency and Clinic). It will default to blank.

8.41.1.6 Report Destination Radio Button

This control allows the user to select either Display on Screen, Send to Printer or Save as PDF. The control will be enabled and will default to Display on Screen when the Generate Participation vs. Enrollment Monthly Report dialog is enabled. If the Report by All radio button is selected, the system will default to Send to Printer.

8.41.1.7 OK Button

This control allows the user to print the report. The control will be enabled when the Generate Participation vs. Enrollment Monthly Report dialog is enabled (See Saving the Data in the Processing section below). Characteristics for the OK button are defined in *Consistencies*.

8.41.1.8 Cancel Button

This control allows the user to exit the Generate Participation vs. Enrollment Monthly Report Dialog. The control will be enabled when the Generate Participation vs. Enrollment Monthly Report dialog is active. Characteristics for the Cancel button are defined in *Consistencies*.

8.41.2 Processes

This section describes the processes (navigation) that take place as a result of the actions taken on the Generate Participation vs. Enrollment Monthly Report dialog.

8.41.2.1 Initializing the Interface

Upon the initial display of the dialog:

- The title bar text will be set to "Generate Participation vs. Enrollment Monthly Report"
- The Month will default to the current month of the Process_Control table.
- The Report by Clinic radio button is initially selected.
- The Display on Screen radio button is initially selected.

8.41.2.2 Edits

Upon selection of the OK button:

- If no selection has been made in the following control
  - Month Dropdown
  - Year Masked Edit Box and Spin Control

  the system will display a standard error message with the text "A selection is required in the <control label>."

- If the Clinic or Agency radio button is selected and no selection has been made in the Agency dropdown, the system will display a standard error message with the text "A selection is required in the Agency."
- If the Clinic radio button is selected and no selection has been made in the Clinic dropdown, the system will display a standard error message with the text "A selection is required in the Clinic."
- If the Year selected is greater than the current system year, the system will display a standard error message with the text "The Year must be less than or equal to the current year."
- If the Send to Printer radio button is selected and a printer has not been selected for the workstation, the system will display a standard error message box with the text "No printer has been specified for this workstation."
- If the Send to Printer radio button is selected and a printer has been selected for the workstation, the system will send the output to the selected printer. The Generate Participation vs. Enrollment Monthly Report dialog is dismissed and returns the user to the Generate Reports dialog.
- If the Display on Screen radio button is selected the system will dismiss the Generate Participation vs. Enrollment Monthly Report dialog and invoke the standard print preview window to allow the user to view the report output.
- If the Save as PDF radio button is selected the system will dismiss the Generate Participation vs. Enrollment Monthly Report dialog and invoke a standard windows save as dialog to allow the user to select the destination of the PDF file output.

Upon selection of the Cancel button:

- The system will dismiss the Generate Participation vs. Enrollment Monthly Report dialog and return the user to the Generate Reports dialog.

8.42 Participation vs. Enrollment Monthly Report (Output) CLD029

The user can generate the Participation vs. Enrollment monthly report from the Generate Participation vs. Enrollment Monthly Report dialog.

The report will display the total number of participants participating, total number of participants enrolled, and the percentage of enrolled who are participating for all WIC categories and then again for each individual WIC category (i.e. infant, child, pregnant, breastfeeding, non-breastfeeding).

```
CLD029                                    <REPORTHEADING>                          RUN DATE: XX/XX/XXXX
<USERNAME>                        PARTICIPATION VS. ENROLLMENT MONTHLY             RUN TIME: HH:MM:SS
                                       MONTH OF <XXXXXXXXXX>                       PAGE: XXX


AGENCY: <XXXXXXXXXXXXXXXXXXXXXXXXX>
CLINIC: <XXXXXXXXXXXXXXXXXXXXXXXXX>


                       CLOSEOUT                         30 DAYS                       ISSUE MONTH
              |-----------------------------| |-----------------------------| |-----------------------------|
                                        %                               %                               %
              PARTICIPATION ENROLLMENT PARTICIPATION PARTICIPATION ENROLLMENT PARTICIPATION PARTICIPATION ENROLLMENT PARTICIPATION

TOTAL             3643        3744       97.3       3730        3775       98.8       3709        3824       97.0

WOMAN TOTAL        794         875       90.7        859         888       96.7        848         890       95.3

BREASTFEEDING      364         364      100.0        364         364      100.0        400         401       99.8

PREGNANT           305         379       80.5        365         379       96.3        344         361       95.3

NONBREASTFEEDING   125         132       94.7        130         132       98.4        123         125       98.4

CHILD             1969        1987       99.1       1975        1992       99.1       1974        1992       99.1

INFANT             880         882       99.8        896         901       99.4        923         942       98.0



                                    *** END OF LISTING ***
```

8.42.1 Data Elements

The values displayed in this report are calculated from the data in the CASELOAD table. The data elements described in this section are broken up into three sub-sections:

- **Table Columns** – Describes the columns of data.
- **Table Column Groups** – Describes how the column groupings affect the data displayed in the columns.
- **Table Rows** – Describes how the rows affect the data displayed in the columns

8.42.1.1 Table Columns

This section describes the rows of data included in the report.

8.42.1.1.1 Participation

This column displays the sum of participants that are enrolled and currently certified to participate in the WIC program. The values displayed are the sum of the CASELOAD_COUNT_UNDUPLICATED data for the WIC category (indicated by the row) over the time span (indicated by the column group).

8.42.1.1.2 Enrollment

This column displays the sum of participants that are enrolled in the WIC program. The values displayed are the sum of the CASELOAD_COUNT_ENROLLMENT data for the WIC category (indicated by the row) over the time span (indicated by the column group).

8.42.1.1.3 % Participation

This column displays the percent of participants enrolled in the WIC program that are also currently certified to participate in the program. The values displayed are calculated using the formula

(Participation / Enrollment) * 100

where Participation and Enrollment data are limited to the WIC category (indicated by the row) over the time span (indicated by the column group)

8.42.1.2 Table Column Groups

This section describes the column groups included in the report.

8.42.1.2.1 Issue Month

This column group is limited to data from the month selected on the Generate Participation vs. Enrollment Monthly Report.

8.42.1.2.2 30 Days

This column group is limited to data from the month before the month selected on the Generate Participation vs. Enrollment Monthly Report.

8.42.1.2.3 Closeout

This column group is limited to data from the month two months before the month selected on the Generate Participation vs. Enrollment Monthly Report.

8.42.1.3 Table Rows

This section describes the rows of data included in the report.

8.42.1.3.1 Total

This row includes data for all WIC categories.

8.42.1.3.2 Woman Total

This row is limited to data for the woman WIC categories (i.e. Pregnant, Breastfeeding, Non-breastfeeding).

8.42.1.3.3 Breastfeeding

This row is limited to data for the Breastfeeding WIC category.

8.42.1.3.4 Pregnant

This row is limited to data for the Pregnant WIC category.

8.42.1.3.5 Non-breastfeeding

This row is limited to data for the Non-breastfeeding WIC category.

8.42.1.3.6 Child

This row is limited to data for the Child WIC category.

8.42.1.3.7 Infant

This row is limited to data for the Infant WIC category.

8.42.2 Filter Criteria

8.42.2.1 Base of Data

This report includes all participants who are currently enrolled in the WIC program and fit the criteria specified on the Generate Participation vs. Enrollment Monthly Report dialog.

8.42.2.2 Sort Order

None

8.42.2.3 Control Breaks

None

8.42.2.4 Frequency and Distribution

This report can be generated on demand.